EVENTS ARE GREAT BRITAIN

A report on the size and value of Britain's events industry, its characteristics, trends, opportunities and key issues

Business Visits & Events Partnership
CONNECTING BRITAIN'S EVENTS INDUSTRY

EVENTS ARE GREAT BRITAIN

HOME TO WORLD-CLASS FESTIVALS, SPORTING OCCASIONS, BUSINESS CONFERENCES AND TRADE EXHIBITIONS

Contents

This report has been compiled by Tony Rogers Conference & Event Services (**www.tony-rogers.com**) on behalf of the Business Visits & Events Partnership. It includes contributions from many BVEP partners and from organisations across the events sector.

Onto a winner!

The 2012 Olympic and Paralympic Games illustrated Britain's unrivalled expertise in staging a world class event, utilising unique skills in innovation, creativity, logistical planning and presentation.

The 2012 Games showed off Britain's array of unique venues, its iconic destinations, its organisational strengths and the ability to fuse a sporting event with opportunities to highlight trade and export opportunities and drive tourism activity.

Britain has one of the best developed infrastructures of destinations, venues and service suppliers in the world, offering a depth of facility and expertise to ensure the successful staging of events and a guarantee of a memorable experience for those attending them. Servicing business visitors and delivering world-class events also means providing stimulating careers and employment opportunities. Some 530,000 people are estimated to be working in the sector.

The powerful outcomes from the 2012 Games must not be seen as simply a one-off benefit of a once-in-a-lifetime event. Every day, throughout Britain, meetings, conferences, exhibitions, trade fairs, outdoor events, incentive travel programmes, corporate hospitality, cultural and sporting events and festivals are being held. Through the skills of Britain's event organising companies, some of the highest-profile events in the world - from major industrial, political, commercial, medical, scientific and educational conferences and trade exhibitions to leading edge motivational, cultural, sporting and music events - are designed and staged. Britain's event businesses are in high demand to deliver more trade and exports, increase knowledge, grow cultural appreciation and enrich the visitor economy.

So now is the time to build on the successes and experiences of 2012, by fully recognising the contribution business and leisure events make to the vitality of the country's economy and their positive effect on local communities and people's lifestyles. Events enhance community cohesion, swell civic pride and shape destination identity by providing a strong local focus and a vibrant communal environment.

This update of the 'Britain for Events' report once again highlights the scope and characteristics of the sector's various segments. It identifies trends, opportunities, key issues and challenges which, if overcome, will advance Britain's position as the leading destination for world-class events and that of its event businesses as the leaders in offering their impressive services around the world.

The report is prepared by the Business Visits and Events Partnership, which brings together the leading industry organisations to identify the benefits of business and leisure events, encourage best practice, favourable policies and new initiatives that will develop the sector's potential in a highly competitive global market place. The report also underpins the work of the industry-wide 'Britain for Events' campaign, which positions Britain as the destination of choice for world-class events.

Events in Britain embrace every part of Britain's economy and enhance its natural assets. That's why this report complements the government's GREAT campaign. It demonstrates that events permeate every aspect of Britain commercial and cultural landscape and underlines the GREAT campaign message that Britain is a GREAT place in which to do business, to learn and to take part in GREAT business and cultural experiences. Events in Britain provide the platform for Britain to showcase itself to the world.

The 2012 Games proved that Britain is onto a winner when it backs its Events businesses. Continued backing of these businesses will secure even more medals for Britain.

Michael Hirst OBE
Chair - Business Visits & Events Partnership

Executive Summary

The UK events industry is worth £39.1 billion

Events account for 35% of the UK visitor economy

Events have so much to offer UK plc. They support the industrial strategy of the UK by positioning Britain as a centre of commerce, attracting companies and industries to do business in our country. They are also an ever-increasing export opportunity as they grow into new territories, creating inward investment opportunities, selling UK skills, expertise and products abroad.

The events industry contributes to exports, inward investment, infrastructure development, cultural appreciation, civic and national pride and community cohesion, to the shaping of destination identity, creative enterprise, innovation, knowledge transfer, professional development, and tourism

Festivals, consumer shows, sporting events and other cultural and music events all help to animate destinations which, in turn, drives more tourism, more business visitors and investors, and students wishing to come to the UK to study.

As an industry, events lead to the employment of some 530,000 people from apprenticeship level upwards. They stimulate thought leadership through the sharing of knowledge, research and intelligence that progresses scientific and technological understanding and innovation. They also bring communities together, whether they are united by a common geography, interest, cause or belief.

Finally, events attract international audiences to the UK, who buy our products and services and, in many cases, return with their families boosting and complementing the UK tourism industry.

However, in a hugely competitive world with competition for events business continually growing, it is vital that the UK continues to show a real hunger and drive to win events, and to ensure that, having done so, events taking place on our shores are given a warm and memorable welcome, one that will inspire both the organisers and the attendees to return to the UK again and again.

The Economic Dimensions of Britain's Events Sector

The sector is worth £39.1 billion to the UK economy in terms of direct spend by event delegates, attendees and organisers. A substantially higher figure is achieved once the wider economic impacts (indirect and induced spend plus accompanying persons' spend) are included. The table provides best estimates for the value to the visitor economy of the discrete segments that comprise the overall events sector in respect of their direct spend.

The Value of Britain's Events Sector – direct spend by segment

Conferences and meetings – £19.9 billion*
Exhibitions and trade fairs – £11.0 billion*
Incentive travel and performance improvement – £1.2 billion**
Corporate hospitality and corporate events – £1.2 billion**
Outdoor events – £1.1 billion**
Festivals and cultural events – £1.1 billion**
Music events – £1.3 billion*
Sporting events – £2.3 billion**

Total= £39.1 billion

*based on new research; **based on previous research estimates
+ the figure for sporting events is the estimated spend by inbound visitors to Britain to play in and watch sporting events in 2008

This total does not include spend of £7.7 billion by those accompanying attendees at business events (source: 'UK Economic Impact Study 2013')

The spend by those accompanying attendees at business events is worth an additional £7.7 billion

The conferences, meetings, incentives and exhibitions segments contributed a total of £21 billion to government tax revenues in 2011, accounting for 3.6 per cent of UK tax revenues in that year*

Enterprise and Employment

There are over 25,000 businesses in the sector including event organisers, venues, destination marketing organisations (DMOs), destination management companies (DMCs), exhibition contractors, event production companies, and a whole plethora of suppliers: transport operators, telecommunications and IT companies, interpreters and translators, speciality caterers, event insurance specialists, and many others.

Events offer a rich diversity of jobs and employment opportunities, from apprenticeship level upwards, both skilled and less skilled, for the young as well as the more mature, male and female – including many opportunities for volunteering and stewarding. The best estimates are that the sector sustains 530,000 full-time equivalent (FTE) jobs, mostly in small and medium-sized enterprises (SMEs).

The events sector is served by 25,000 businesses employing 530,000 people

Export Earnings

Events and exhibitions are important not just for the national benefits of expenditure generated and jobs created and sustained through activity here in the UK, but also for the 'invisible' benefits of their export earnings potential. Many of the leading exhibition organising companies operating globally are UK companies. Additionally the UK's skills and expertise in the design of stands and content (digital media, film, technical exhibitory) are world-leading, leading the world in the development of cutting edge, business-to-business (B2B) and business-to-consumer (B2C) exhibitions and trade fairs.

A significant proportion of the trade transacted at UK exhibitions is export-related. The profits generated from staging events across the world also return significant export income to UK Plc.

The top 10 leading event agencies in the UK have a turnover of more than £2 billion, much of which is generated outside the UK

Investment

Britain has an excellent track record of investing in its event facilities and supporting infrastructure.

Over £1 billion of new infrastructure investment is being stimulated by events

In addition to large-scale projects providing new facilities and venues, there are also sizeable opportunities to be derived from the proposed improvements in regional rail connectivity and increased airport capacity.

Yet there is still a lack of large-scale integrated hotel and meeting facilities, such as they have in the USA and the Far East, putting the UK at a disadvantage when bidding for some of the large conventions.

** based on a contribution of £58.4 billion to GDP by business events in 2011 (source: 'UK Economic Impact Study 2013' - see Chapter 1 for more details)*

Event Social Impacts

The benefits of meetings and events are not just economic. Meetings and events have other positive impacts on society, contributing to health and wellbeing, education, social diversity, community spirit and cohesion, and civic pride. Events help to foster diversity in our local culture and heritage, providing opportunities for further destination expansion and growth.

Major cultural events are recognised as significant drivers of national and regional performance, of physical and social regeneration and of cultural development

The Legacy of the 2012 Olympic and Paralympic Games

The Olympic and Paralympic Games are estimated to be worth some £2.3 billion to UK tourism over the period 2007-2017, generating an additional 20 per cent of expenditure from business and incentive groups visiting the Games, holding meetings and special events and extending their stay around Britain, equivalent to over £500 million.

Britain has met a four-year target to raise more than £11 billion of economic benefit from the London Olympic and Paralympic Games in just over a year. The figure includes almost £6 billion in additional sales and £2.7 billion from foreign direct investment.

About £130 million was raised through contracts won by British companies for the Brazil 2014 World Cup and the Rio de Janeiro 2016 Olympic and Paralympic Games on the back of their experience of working at the London Games.

The events industry has inherited a whole new set of event professionals that now have local, national and international experience and exposure under their belts. This has created a larger, more mobile professional skills pool, providing an international competitive advantage for exporting the creative and production skills of the UK's events industry.

Inbound Business Visits and Events

Inbound business visits to Britain equate to 23.5% of all visits and, at £4.4 billion, 24.4% of all spend

Inbound business visits in 2012 totalled 7.4 million, 2 per cent higher than in 2011 and the best since 2008. However, despite moving in the right direction since the nadir of inbound business trips in 2009, the volume and, in real terms, value of such visits remains roughly one-fifth lower than it was in 2006, when there were 9 million business trips worth £5.7 billion at today's prices.

International business travellers spend £611 per visit worth £4.4 billion annually – leisure visitors spend £583 per visit

Changing the Perceptions and Profile of Business Visits and Events

Meetings and conferences play a vital role in economic, professional and educational development. They should be thought of as a key component of the global knowledge economy, rather than as a branch of tourism.

Business events account for 30% of the UK visitor economy

Events are still essential to communicate, educate, inform, to enable networking, to motivate teams and to achieve business objectives. The task is to demonstrate the absolute value of the meetings and live events industry as a quantifiable investment, not a frivolous cost.

Corporate Meetings and Conferences

There are over 1.3 million meetings held in the UK each year

The resurgence of the wider UK economy has been accompanied by renewed growth in corporate meetings and conferences as companies recognise the importance of such events in reaching strategic business objectives and in communicating effectively with their employees, customers and partners worldwide.

While meetings will continue to experience financial pressure and need to demonstrate tangible value, new emergent industries (e.g. neuroscience, energy, biotech and nanotechnology) will require more events, whereas others (e.g. health, finance, pharma, government) may engage in fewer face-to-face meetings due to regulation and cost.

Association Events

There are opportunities to enhance the international aspects of UK association events by encouraging British associations to bid to host their international meeting counterpart. Recent research has highlighted that many international delegates attend UK association events - one, in-particular, had a high percentage as the international delegates attending saw that CPD (continuing professional development) credits from the UK were of more value than those from certain other parts of the world.

The UK is 4th in the global ICCA rankings for international association congresses

The UK has also led the world in developing conference ambassador programmes, a model now being replicated by many cities globally as a conduit to bid for and secure international association congresses.

Exhibitions and Experiential Events

Exhibitions play a vital role in the UK economy in generating exports. Many exhibitions held in the UK have established themselves as a strong base for international trade.

New technology is used to enhance, not replace, exhibitions, as there is no substitute for the face-to-face contact, customer interaction and the ability for the customer physically to feel, see, taste, smell, test and try the product.

UK exhibitions attract over 13 million visitors each year, generating £11.0 billion in spend

Exhibitions do more than just sell: they build product branding, strengthen existing customer relationships, produce high quality leads, educate, have applications for market research, generate media coverage and are often used to launch new products. Exhibitions play a vital role in the marketing mix offering a wide range of benefits.

Exhibitions provide a cost-effective competitive platform for small and medium-sized enterprises (SMEs) to promote and sell their products and services, enabling many SMEs to establish themselves in the marketplace and, through international visitor attendance at exhibitions, often providing SMEs with their first openings to export markets.

In 2010 over 265,000 exhibitors participated in events, 20% from outside the UK

The exhibition industry is continually endeavouring to increase the 'internationality' of its shows in order to enhance the opportunity for exhibitors to increase their export markets.

In 2010 exhibitors spent £2.7 billion on goods and services to demonstrate at events

Incentive Travel and Performance Improvement

Incentive travel is a well-established sector of business events and for international markets the UK is one of the most popular destinations. However, visitor numbers are greatly influenced year-on-year by the strength of the pound in relation to other currencies and by issues such as perceptions of security and the ease/cost of visa processing.

It is debatable whether incentive travel as a market segment will ever hit the dizzy heights of the 1990s when groups of 300-400 participants were not unusual, especially within the financial services sector. In these more austere and regulated times, the average group size is nearer 40-50 participants. It seems likely that the same, or similar, numbers of events will continue outbound from the UK but they will be marketed more as 'conferences' than pure incentives.

There is an enduring appeal to hosted, group travel as an incentive which suggests that this particular service will continue within certain niche markets and be serviced by specialist operators for some years to come. Growth is likely to come from unregulated markets such as electronics and IT rather than the former major sectors of pharmaceutical, financial services and automotive.

Corporate Hospitality and Corporate Events

In general, the corporate events and corporate hospitality market remains robust despite some very negative media coverage of corporate 'excess' at a time of economic difficulty. The segment remains resilient and companies, even those in the financial services sector, still depend on corporate hospitality as a means of developing loyalty and increasing market share with their clients and as a core activity for rewarding and motivating their own staff.

Over the next five years, a series of major sporting and business events, both one-off and regularly occurring events including the Glasgow Commonwealth Games in 2014, the Rugby Union World Cup in 2015, Royal Ascot, Wimbledon, the Farnborough Airshow, will continue to offer important opportunities for corporate hospitality and corporate entertainment.

Outdoor Events

Outdoor events cover a breadth of activity from major festivals, music events, agricultural shows, sporting and charity events through to small village and craft events. From the beginning, outdoor events have drawn large gatherings whether local, national or international; and this is an increasing trend following the Olympics in 2012. The visitor from abroad is attracted to a myriad of events in the UK, many of them being steeped in tradition and history.

The UK is now recognised by Europe and the USA as a world leader in outdoor events, with many UK companies exporting their expertise

The world of outdoor events has developed into a highly professional and quality standard industry made up of local authorities, show organisers, event management companies, promoters, venue owners, together with suppliers of equipment and services, and consultants.

Music Events and Festivals

6.5 million music tourists spend £1.3 billion annually

Major cultural events are recognised as significant drivers of national and regional performance, of physical and social regeneration and of cultural development. A range of annual festivals and promotional events showcase excellence in the creative industries and provide an iconic focus for the visitor economy, making Britain the natural destination choice and an international hub for world-class events.

'Music is an industry that is an international success story and we should go on backing it. It's not just the exports that it provides for this country. It's not just the people it employs in this country. It's the massive and growing music tourism, people coming to Britain to listen to great acts.'

(David Cameron, UK Prime Minister).

- £2.2 billion – the total of direct and indirect spend generated by music tourism in 2012
- 41 per cent – the proportion of live music audiences that are music tourists
- £657 – the average spend by overseas music tourists while in the UK
- 24,251 – the number of full-time jobs sustained by music tourism

The UK's music festivals and the extensive touring programmes of international acts attract massive overseas interest and foreign visitors to the UK. Alongside inbound tourists, many music lovers in the UK also travel long distances to watch their favourite bands and artists perform. This is international and domestic music tourism working – and working well.

Over 400 folk festivals take place in the UK annually worth over £100 million to local economies

Sporting Events

Sports tourism has been central to the growth in global travel and tourism during the new millennium. Sport also has a role to play in helping to address wider social issues encompassed by the millennium development goals. It can help to address gender inequality and assists with the development of life skills such as leadership, decision making, organisational and management skills. Sport can also act as an effective medium for conveying educational messages relating to health issues such as HIV/AIDS awareness and malaria.

The economies of cities, regions and – in the case of mega events such as the Olympic Games or FIFA World Cup – entire countries are increasingly reliant on combining sport and tourism to jump-start economic and socio-economic change. Tourists engaged in sports tourism are high-spending, stay longer than other tourist categories, and often stimulate other forms of tourism. Their direct benefit to a destination is cash – their indirect benefit can be years of follow-on tourists.

Events Sector Suppliers

The event industry is hugely diverse and its requirement for suppliers covers an enormous breadth of professions, from staging and structures to water management and waste recycling.

This diversity of events, together with the unique demands of some venues particularly for outdoor events, has required the development of specialist skills in many areas and the UK industry is widely recognised as a world leader in some of these sectors.

By its nature the event industry tends to be highly entrepreneurial, which encourages innovation. However, the last decade has seen it also becoming increasingly professional in its approach with a great deal of time being devoted by event organisers and suppliers to developing professional standards across the market, from specialist guidelines for the erection of temporary structures and stages to information for those organising events such as the 'Purple Guide'.

Winning Business for Britain

a) The Ministerial Bid Support Initiative

The Ministerial Bid Support Initiative has an important role to play in demonstrating a more cohesive approach and in conveying crucial messages about how committed Britain is today to winning bids for major international events.

Access to Government ministerial support for major international congress bids is being coordinated through VisitEngland working closely with the Department for Culture, Media and Sport (DCMS). For further information: **www.visitengland.com/business**

b) UK Trade and Investment's Events Alliance

In July 2013 UK Trade and Investment (UKTI) published an outline strategy for the events sector including the Events Alliance initiative. UKTI will work with event organisers to increase the number of UK and overseas trade-related events supported by UK Trade and Investment from 75 to 300 core events over the succeeding 18 months. Core events are events which have major significance for the industry sector and are part of the annual UKTI programme. Further information: **www.ukti.gov.uk**

Quality, Standards and Sustainability

The events and meetings industry has truly embraced the concept of continuous improvement and made a clear commitment to raising quality standards. It is now accepted that opportunities to monitor and measure quality standards exist across all elements of events and meetings delivery, from initial contact to service, facilities, equipment, food and overall experience.

The 'AIM' (accredited in meetings) accreditation is driving the industry to become more competitive and accountable, deliver great value and help clients consistently achieve ROI

At an international level, there have already been a number of significant developments designed to integrate sustainability criteria and activities into a wide range of business events, including the publication of formal Standards to provide guidance on sustainable event management.

The UK-driven Green Standard ISO20121 has been exported around the world as a benchmark of best practice

The event industry's 'purple guide' puts the UK at the forefront of events health and safety worldwide

Education, Careers and Professional Development

Events industry trade associations have discussed better collaboration and initially identified two education-related activities that the industry could provide collaboratively: cross-industry internships and training programmes specifically with and for students; and better communication for both academics and students on the offerings of industry trade and professional associations through the creation of an online hub.

Education and continuing professional development (CPD) are essential to be ahead of the next new idea or technology - to be able to see the opportunities and benefits for events. Events could be leading the way in new design and not relying on film and theatre to do this for them. The opening and closing ceremonies of the Olympics and Paralympics 2012 demonstrated how the creative industries are as much a part of the events industry as of their own. Nurturing, developing and releasing these initiatives are what will keep British events GREAT.

The events sector creates engaging careers, for young and old, male and female, skilled and less skilled, across all cultures. It maximises a wide range of creative, technical and personal talents to produce inspirational and world-changing events

An Institute of Event Management is being established to provide an opportunity for individuals who already work or wish to work in the Events Sector to gain professional recognition and to enhance their profile, skills and knowledge. The aim is for the Institute to offer a route to professional development, accreditation of courses and a body of knowledge.

Working in Partnership

The Business Visits & Events Partnership is an umbrella organisation representing leading trade and professional organisations, government agencies and other significant influencers in the business visits and events sector.

The BVEP exists to:

- garner the cohesive opinion of these stakeholders and collectively influence and develop policies, practices and strategies that support and generate growth in the sector and,
- raise sector awareness through clear communications of the social and economic benefits of the business visits and events sector.

The Partnership seeks to provide a cohesive point of view for the entire business visits and events sector. The BVEP works with prominent sector leaders including its partners, government departments and agencies to influence and develop policies and practices favourable to the growth of business events, and trade and creative enterprise through business visits and events.

It has the support of the leading trade and professional organisations and government agencies with a shared interest in the economic benefit and growth of conferences, meetings, exhibitions, trade fairs, incentive travel, corporate hospitality, ceremonies, as well as other business, sporting, cultural and festival events.

- Association for Conferences and Events
- Association of British Professional Conference Organisers
- Association for Events Management Education
- Conference Centres of Excellence
- Eventia-IVCA
- Events Industry Alliance
- Events Industry Forum
- Hotel Booking Agents Association
- International Congress & Convention Association
- International Special Events Society
- London & Partners
- Meet in Ireland
- Meetings Industry Association
- Meeting Professionals International
- National Outdoor Events Association
- Northern Ireland Tourist Board
- Professional Convention Management Association
- Tourism Ireland
- VisitEngland
- VisitScotland
- Visit Wales
- Supporting Government Bodies:
  - Department for Culture, Media & Sport
  - UK Trade & Investment
  - VisitBritain

Access to full information on BVEP and its partner organisations, and to the full 'Events Are GREAT Britain' report, is via the website: **www.businessvisitsandeventspartnership.com**

Chapter 1

This is GREAT

Overview of the UK Events Industry

Following the success of the 2012 Olympic and Paralympic Games, the events industry in the UK has never been in a better place to build on the global perceptions of the UK as an events destination. It is in a prime position to take on the world of event management and creativity outside our own borders.

The bar has been raised in how we respond to event briefs, with suppliers and venues constantly rising to the challenge of producing ever better and more creative solutions to meet client objectives. London, for example, has seen a pop-up culture flourishing, with new places and spaces being used; and a collective desire to work across a number of stakeholders to ensure events come to fruition and are successfully executed. In the words of Tracy Halliwell, Director of Business Tourism & Major Events for London & Partners: *'We also find ourselves asking "How can we do something?" much more often than the too oft uttered "….can't be done!" of the past.'*

Government and wider business groups are beginning to see the value and the broader economic benefit of the events industry to the UK economy, and we are collectively working to overcome barriers to doing business for the future: Air Passenger Duty (APD), visas, transport issues, all are widely debated, and with one loud voice. Events, whether meetings, association events or trade exhibitions, underpin sectoral growth in the economy, attract foreign direct investment, and promote expertise and knowledge transfer opportunities. Festivals, consumer shows, sporting events, business networking sessions and other cultural and music events all help to animate a destination which, in turn, drives more tourism, more business visitors and investors, and students wishing to come to the UK to study – whether that be in the area of event management or in other disciplines.

The reasons for staging business events include opportunities to create and disseminate knowledge, stimulate learning, enhance business performance, foster personal and professional development, increase sales, and to address major societal and environmental challenges.

Events have so much to offer UK plc. They support the industrial strategy of the UK by positioning Britain as a centre of commerce, attracting companies and industries to do business in our country. They are also an ever-increasing export opportunity as they grow into new territories, creating inward investment opportunities, selling UK skills, expertise and products abroad.

As an industry, events lead to the employment of over 530,000 people from apprenticeship level upwards. They stimulate thought leadership through the sharing of knowledge, research and intelligence that progresses scientific and technological understanding and innovation. They also bring communities together, whether they are united by a common geography, interest, cause or belief. Finally, events attract international audiences to the UK, who buy our products and services and, in many cases, return with their families, boosting and complementing the UK tourism industry.

The 2013 economic impact study of the UK's meetings and business events segment has now put some more quantifiable figures behind the meetings industry, and these, together with studies into other segments (exhibitions, music events and festivals, for example, all referenced further in this report) can only help in gaining wider recognition and support for the sector, enabling us to bid for, solicit, create and win new events for the future.

However, in a hugely competitive world with competition for events business continually growing, it is vital that the UK continues to show a real hunger and drive to win events, and to ensure that, having done so, events taking place on our shores are given a warm and memorable welcome, one that will inspire both the organisers and the attendees to return to the UK again and again.

The economic dimensions of Britain's events sector

A major 2013 study into the economic impact of the meetings and business events segment of the UK's events industry ('The Economic Impact of the UK Meeting & Event Industry'), undertaken by Leeds Metropolitan University on behalf of the MPI Foundation, found that, in 2011, 1.3 million meetings were held in the UK. Just under £40 billion was spent by those attending these meetings, and the segment generated more than £20.6 billion in gross value added (GVA) and £58.4 billion in gross domestic product (GDP) in 2011. A breakdown of the volume of meetings held in the four countries of the UK is shown in Table 1.1, while Table 1.2 provides details of the numbers of meetings held in several major cities.

Table 1.1

Meeting Volume by Home Country

Country	Meetings	%
England	1,118,827	86.0
Scotland	86,524	6.6
Wales	75,802	5.8
Northern Ireland	20,447	1.6
Total	**1,301,600**	**100.0**

Source: 'The Economic Impact of the UK Meeting & Event Industry' (MPI Foundation – **www.mpiweb.org/ukeis**)

Table 1.2

Meeting Volume by City

Country	Meetings	% of home country
London	362,500	32.4
Cardiff	47,376	62.5
Edinburgh	28,553	33.0
Belfast	14,436	70.6
Liverpool	19,020	1.7

Source: 'The Economic Impact of the UK Meeting & Event Industry' (MPI Foundation – **www.mpiweb.org/ukeis**)

The same study revealed that the direct spending associated with UK meeting organisers was £24.7 billion in 2011. Of this spend, £6.4 billion was funded by registration fees paid by delegates and attendees. More than half of the direct spending was on venue hire, equipment and production, food and beverages and administration. Table 1.3 provides a more detailed breakdown of meeting organisers' direct expenditure and demonstrates how such activity benefits a plethora of other industries (such as advertising, insurance, printing and transportation).

Table 1.3

Direct Spending by Meeting Organisers

Spending category	Amount (£, million)	%
Venue hire	4,052	16.5
Food and beverages	2,848	11.6
Equipment/production	3,115	12.7
Technical costs	1,494	6.1
Administration	2,454	10.0
Advertising and promotion	746	3.0
Keynote speakers/trainers and other sponsored attendee expenses	454	1.8
Insurance	305	1.2
Other facility costs	262	1.1
Meeting management company / destination management company	155	0.6
Printing	403	1.6
Temporary agency staff	1,470	6.0
Tour operator services	735	3.0
Registration	142	0.6
Company staff (food and beverages, travel, accommodation)	441	1.8
Audio-visual and staging	1,445	5.9
Entertainment/décor/gifts and awards	489	2.0
Shipping	107	0.4
Delegate materials (delegate bags, give-aways)	164	0.7
Transportation	1,200	4.9
Accommodation (organisation purposes only, non-delegate)	1,516	6.2
Corporate social responsibility	40	0.2
Maintenance and repairs	265	1.1
Energy and other utilities	110	0.4
Other	204	0.8
Total	**24,616**	**100.0**

Source: 'The Economic Impact of the UK Meeting & Event Industry' (MPI Foundation – **www.mpiweb.org/ukeis**)

The economic impacts of the live music events segment, specifically concerts and festivals, also underline the positive benefits accruing to the UK economy through the creation, promotion and staging of events. Research undertaken by UK Music and published in October 2013 as a report entitled 'Wish You Were Here', found the following impacts of live music events:

- £2.2 billion – the total of direct and indirect spend generated by music tourism in 2012
- £1.3 billion – the amount spent directly by music tourists
- 6.5 million – the number of music tourists
- 41 per cent – the proportion of live music audiences that are music tourists
- £657 – the average spend by overseas music tourists while in the UK
- 24,251 – the number of full-time jobs sustained by music tourism.

Further details of UK Music's research are given in Chapter 3.

Employment

There are over 25,000 businesses in the sector including event organisers, venues, suppliers, destination marketing organisations (DMOs), destination management companies (DMCs), and others. The best estimates are that the sector sustains at least 530,000 full-time equivalent (FTE) jobs (source: People 1st's 'Labour Market Review of the Events Industry' – January 2010).

An Office for National Statistics (ONS) paper, 'Employment Characteristics of Tourism Industries' (March 2011), indicates that there are 27,800 people employed as 'conference and exhibition managers and organisers'. The paper says that there are 2.7 million people employed in tourism for whom this is their main or second job (185,000 of these are second jobs), although one million of the main jobs in tourism industries are part-time. Of the total of 2.7 million main or second jobs in tourism, 695,000 are in 'cultural, sports, recreational and conference activities'. 486,000 (of the 695,000 total) have 'employed' status while a further 203,000 are 'self-employed' (with 6,000 described as 'other').

The MPI Foundation's 'The Economic Impact of the UK Meeting & Event Industry' (July 2013) estimates that the meetings and business events segment sustained 423,445 full-time equivalent (FTE) jobs in 2011. Among tourism-related industries, meetings activities supported 133,228 FTE jobs in accommodation services for visitors, whilst there were 14,755 FTEs in meetings organisations and 18,399 FTEs in meetings venues. Table 1.4 provides further analysis of the numbers of FTE jobs sustained directly by meetings activity.

Table 1.4

The Number of Direct Meetings Full-time Equivalent Jobs (in 2011)

Industries	Direct FTE jobs
Tourism-related Industries	
Accommodation for visitors	133,228
Food and beverage servicing	54,607
Railway passenger transport	15,585
Road passenger transport	45,951
Water passenger transport	273
Air passenger transport	6,605
Transport equipment rental	1,772
Travel/reservation agencies	15,711
Sport, recreation and culture activities	25,025
Meetings-specific industries	
Meetings organisations	14,755
Meetings venues	18,399
Other consumption products	87,006
Total	**423,445**

Source: 'The Economic Impact of the UK Meeting & Event Industry' (MPI Foundation – **www.mpiweb.org/ukeis**)

Tax Revenues

The meetings and business events sector contributed a total of £21 billion to government tax revenues in 2011, according to the MPI Foundation's 'The Economic Impact of the UK Meeting & Event Industry', accounting for about 3.6 per cent of UK tax revenues in that year. Figure 1.1 illustrates the percentage of total economic impact of different taxes by meeting activities. The contributions to income tax, taxes on products and corporation taxes account for more than 60 per cent of the total economic impact of tax revenues.

Export Earnings

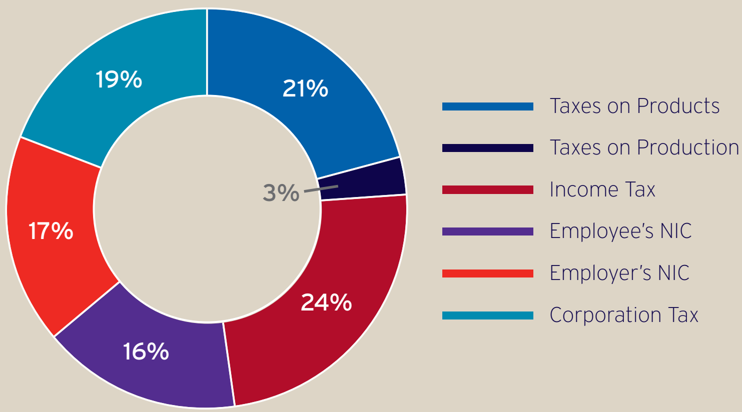
Events and exhibitions are important not just for the national benefits of expenditure generated and jobs created and sustained through activity here in the UK, but also for the 'invisible' benefits of their export earnings potential. Many of the leading exhibition organising companies operating globally are UK companies: Haymarket Exhibitions, EMAP Communications, United Business Media, Reed Exhibitions, for example. Additionally the UK's skills and expertise in the design of stands and content (digital media, film, technical exhibitory) are world-leading, with players such as Imagination, Rapier and Land sitting at the forefront of the UK's export of creative skills. These are all true international players leading the world in the development of cutting edge, business-to-business (B2B) and business-to-consumer (B2C) exhibitions and trade fairs. The profits generated from staging events across the world return significant export income to UK Plc.

Britain has an unparalleled reputation in the event arena and possesses some of the world's most successful event management companies and strongest suppliers of logistics and content for events: companies such as Grass Roots, Motivcom, UniversalWorldEvents, George P Johnson, and Concerto Group. This resource is responsible for staging many of the world's major international congresses, high profile sporting events (such as the opening and closing ceremonies of the Olympic Games), festivals, popular and classical music concerts, in fact the full gamut of business, cultural and sporting events.

Much of this activity takes place outside the UK and adds substantially to the revenues generated from the international events sector for the British economy. A survey of the major UK event agencies by 'Conference & Incentive Travel' magazine (published June 2013) found that annual turnover of the top ten leading agencies topped £2 billion, much of which is generated from events held outside the UK.

Fig. 1.1

The Composition of Total Contributions to Different Taxes in 2011



Source: 'The Economic Impact of the UK Meeting & Event Industry' (MPI Foundation – **www.mpiweb.org/ukeis**)

CASE STUDY

Maximising the Benefits of Major Events

Using major events to secure direct economic impacts, beyond tourism, for any Host Nation is not easy. It is highly unlikely that, as a result of visiting an event, a company CEO will decide immediately to relocate his business to the Host Nation! However, events do have the potential to have significant positive economic impacts over a number of years. Hosting guests can establish relationships which can be built on to secure future investments; local suppliers can benefit, both in the short term and through establishing relationships which may reap long term benefits. Links to major events can build profile for Host Nations, Host Cities and Host Venues. Entertaining both the American and Chinese Ambassadors during the 2010 Ryder Cup (in Newport, Wales - see Chapter 5) led to return visits to Wales by both parties early in 2011, allowing both high profile guests to participate in valuable company visits and business discussions while Wales' profile was still high, internationally.

Pointing to Wales' emerging events strategy, officials observed that the prestige of The Ryder Cup would help raise Wales' standing in overseas markets being targeted by inward investment teams overseas and commented that their experience in dealing across the private and public sector would help deliver, not only a successful event, but help ensure the best long term impact from it.

Source: Final Report - Ryder Cup Wales 2010 Ltd

Investment

Britain has an excellent track record of investing in its event facilities and supporting infrastructure. Some examples of significant current investments at destination and venue level indicate the scale of such investments, and include:

- Edinburgh International Conference Centre expansion - £30 million - completed 2013
- Telford's Convention Quarter development - £250 million
- Expansion of the ACC Liverpool - £40 million
- The 12,000-seat Hydro arena, Glasgow, £125 million, part of a £6 billion investment in Glasgow's infrastructure in preparation for the 2014 Commonwealth Games
- £10 million investment in Bailbrook House Hotel, Bath, a 10-month restoration project completed September 2013
- £6.9 million conversion of the Lilleshall National Sports Centre, Shropshire, to convert it into a conference centre
- £26 million refurbishment of The Belfry (host to more Ryder Cup golf matches than any other venue)
- Plans for a new £200 million exhibition centre in Aberdeen to open in 2017
- A new £17.5 million conference centre, College Court, at the University of Leicester
- £1 billion investment into Dundee's 240-hectare waterfront area, including the new £45 million V&A museum which will have 1,500 sqm of flexible gallery space and areas for meetings and events
- £17.5 million redevelopment at London venue Wellcome Collection.

Other examples of investment projects and expenditure are to be found in this Report.

Yet there is still a lack of large-scale integrated hotel and meeting facilities, such as they have in the USA and the Far East, putting the UK at a disadvantage when bidding for some of the large conventions. This, however, is an issue for Europe as a whole, not just for the UK.

Investment does not just mean spending money on the physical product and supporting infrastructure. It is also as important to invest in people and in relationships with existing and potential customers. An Oxford Economics report, 'The Role of Business Travel in the US Economic Recovery', commissioned by the US Travel Association (and published May 2013), shows that companies which spent the most on business travel through the last recession are posting higher revenues and profile than others. In contrast, companies which reduced business travel spending were more likely to see a decline in profits.

The report reveals that, for every dollar invested in business travel, US companies have experienced a $9.50 return in terms of revenue and $2.90 in profits. In 2011, US businesses spent $214 billion on domestic travel, surpassing the historic peak set in 2007. For 2012, businesses are estimated to have spent $225 billion on US domestic travel, about 5 per cent more than the previous year. The report says that business travel expenditures generated 1.9 million jobs, $59 billion in personal income and $35 billion in tax revenues in 2012.

Exhibitions and experiential events

Exhibitions play a vital role in the UK economy in generating exports. Many exhibitions held in the UK have established themselves as a strong base for international trade. It is estimated that the 'World Travel Market' exhibition, held at London's ExCel venue in November 2013, generated £150 million of expenditure for the UK economy – and £2 billion of business was transacted at the event itself! The British Fashion Council's London Fashion Week – held over four days in September 2013 – was thought to have generated a further £100 million for the capital's economy.

Recent research (**www.facetime.org.uk**) confirms that, before an exhibition or similar live event, 36 per cent of people say attendance makes it easier to decide to buy, but this rises to 76 per cent after experiencing an event. The research also showed that, before attending an event, 28 per cent of visitors believe "experiencing a business first-hand makes it more memorable" – after the event, this rises to 65 per cent.

New technology is used to enhance, not replace, exhibitions, as there is no substitute for the face-to-face contact, customer interaction and the ability for the customer physically to feel, see, taste, smell, test and try the product.

More organisers are looking to increase the number of public shows. Public shows are seen as being informative, as well as providing marketing and sales opportunities, brand building and entertainment, all of which add to customer value and experience.

The exhibition industry is continually endeavouring to increase the 'internationality' of its shows in order to enhance the opportunity for exhibitors to increase their export markets.

CASE STUDY

Corporate Launch of Shell V-Power Nitro+ Fuel

Summary

Experiential event agency TRO were tasked by Shell to launch their new high performance fuel, V-Power Nitro+, to three different business audiences: retailers, forecourt attendants and the press. In a highly price sensitive market, it was absolutely key for these audiences to understand, and be excited by, the competitive advantage of this premium new fuel.

TRO developed three separate launch events tailored to the audiences' specific needs, interests and availability, to ensure maximum attendance and a positive response to the launch.

Internal Audiences

TRO wanted a creative route that instantly excited the audience and made them feel part of something special. So it devised the creative tagline "Our best just got better" and developed the content from a standpoint of teamwork and performance.

Retailer Conference

To give the event a 'wow' feel, the launch was set in the round with 20 projection screens immersing the audience in rich inspirational content, and exciting them about the possibilities of the new V-Power Nitro+ fuel. The product benefits were explained 'from the horse's mouth' by Shell scientists who had developed the fuel. As well as a comprehensive overview of the marketing strategy, the audience were treated to an intimate Q&A session hosted by Jake Humphrey, with Olympic medal winners Katherine Grainger, Tim Bailey and Etienne Stott, and the Head of Engineering at Ferrari F1, Dave Salter, taking part. The event was a great success with very positive retailer feedback.

Forecourt Attendant Training Day

Dropout rates are traditionally high with this audience, so removing barriers to attendance, and including fun and exciting content, were essential considerations. TRO ran training days at go-kart tracks in five different cities, reducing travel time considerably. With a training workshop in the morning, the audience enjoyed a competitive go-kart session in the afternoon, highlighting both teamwork and performance, as well as being great fun. The event was Shell's most successful training day to date with over 90 per cent attendance.

Press Launch

TRO needed to firmly position V-Power Nitro+ as a high performance fuel so, working closely with JCPR, they teamed up with Ferrari F1 to deliver an exciting, hands-on launch event. Held at Battersea Power Station, TRO built a bespoke race circuit. After some handling and performance training by Ferrari test drivers, attendees could test out the new fuel racing a Fiat 500 around the track. They could also enjoy a 'hot lap' in a Ferrari with F1 driver Giancarlo Fisichella. TRO had Shell scientists on hand to explain the product benefits and an F1 Ferrari simulator for those attendees who had really caught the racing bug! The event was incredibly successful with 90 per cent attendance, £970,000 worth of PR generated and a total reach of 8,721,259.

By understanding that it had three distinct audiences, and splitting the launch activity accordingly, TRO were able to deliver three highly successful events that fed into one very strong overall new product launch for Shell, in the B2B sector.

www.tro-group.com

Event social impacts

The benefits of meetings and events are not just economic. Meetings and events have other positive impacts on society, contributing to health and wellbeing, education, social diversity, community spirit and cohesion, and civic pride. Events help to foster diversity in our local culture and heritage, providing opportunities for further destination expansion and growth. For more information on the broader impacts and benefits of events, visit: **www.eventimpacts.com**

The legacy of the 2012 Olympic and Paralympic games

An article in The Times newspaper (16/11/13) states that Britain has met a four-year target to raise more than £11 billion of economic benefit from the London Olympic and Paralympic Games in just over a year. The figure includes almost £6 billion in additional sales and £2.7 billion from foreign direct investment. About £130 million was raised through contracts won by British companies for the Brazil 2014 World Cup and the Rio de Janeiro 2016 Olympic and Paralympic Games on the back of their experience of working at the London Games. UK Trade & Investment's British Business Embassy began the Olympic legacy drive in 2012 by hosting a conference and 17 business events.

A report from Crewsaders (**www.crewsaders.com**) entitled 'Lessons Learned from 2012: Mega Events and the UK Events Industry Supply Chain' (published February 2013 – the report is freely accessible on the BVEP website) highlights areas where improvements can be made for the staging of future mega events, especially in demand-side forecasting, the creation of government and industry partnerships, communications with the supply chain and with staff. However, it describes the myriad positive outcomes as the legacy dividend, and concludes:

'In terms of manpower, the events industry has inherited a whole new set of event professionals that now have local, national and international experience and exposure under their belts. This has created a larger, more mobile professional skills pool. This can lead to an international competitive advantage for exporting the creative and production skills of the UK's event industry.

Productivity enhancements through implementing new internal and external management and working practices have created efficiencies in the supply chain for the future. This also creates international as well as individual competitive advantage. Added to this, the fact that many suppliers now hold state-of-the-art equipment that can also be exported to any part of the globe also adds to the UK's competitive advantage on an international stage.

Through the creation of partnerships with organisations that had previous international mega event experience, the transfer of knowledge of that experience to the UK events industry has created a confident industry that can execute quality creative events in any place and in any format around the globe.'

Domestic business visits

According to the 'Great Britain Tourism Survey', domestic business travel grew by 3 per cent in 2012, with the number of trips taken rising to the highest level since the current survey began. Spending rose ahead of volume with 6 per cent growth. Table 1.5 shows the volume of business trips in 2012 to the ten most popular English destinations; Table 1.6 shows the spend on business trips by destination.

Table 1.5

Business Trips – Trip Volume		Trips (Thousands)
1	London	3248
2	Manchester	885
3	Birmingham	874
4	Leeds	420
5	Sheffield	314
6	Bristol	290
7	Newcastle upon Tyne	273
8	Northampton	208
9	Liverpool	202
10	Portsmouth	182

Source: Great Britain Tourism Survey 2012

Table 1.6

Business Trips - Spend		Spend (£ millions)
1	London	954
2	Manchester	244
3	Birmingham	188
4	Leeds	112
5	Bristol	60
6	Newcastle upon Tyne	53
7	Sheffield	51
8	Liverpool	44
9	Northampton	44
10	Exeter	40

Source: Great Britain Tourism Survey 2012

Inbound business visits and events

Inbound business visits in 2012 totalled 7.4 million, 2 per cent higher than in 2011 and the best since 2008. However, despite moving in the right direction since the nadir of inbound business trips in 2009, the volume and, in real terms, value of such visits remains roughly one-fifth lower than it was in 2006, when there were 9 million business trips worth £5.7 billion at today's prices (source: VisitBritain's 'Foresight' Issue 110, December 2012). Table 1.7 illustrates the fact that not only has the amount of business tourism taking place declined, so too has its relative share of the overall inbound tourism market, having seen its share of visits fall from 28 per cent in 2006 to about 23.5 per cent in 2012, while in terms of spending the decline has been from 30 per cent to 24 per cent. This indicates that other segments of the market, such as holiday trips, have been more resilient than has business tourism since the global financial crisis took hold.

Table 1.7

Relative Importance of Inbound Business Tourism to Britain

Relative Importance of Inbound Business Tourism to Britain (% share of visits and spend)		
	% of Visits	**% of Spend**
2006	27.6%	29.7%
2012 (estimate)	23.5%	24.4%

Source: VisitBritain / 'Foresight' Issue December 2012

The International Passenger Survey records journey purpose information in a little more detail than simply 'business tourism' and the results for 2011 can be seen in Table 1.8. There were almost six million visits for routine 'business/work', with such trips generating £3.3 billion in spending. The numbers visiting a trade fair were far smaller in comparison, but nonetheless accounted for more than £200 million of spending in 2011. More than one million visits were made to Britain in 2011 in order to attend a conference or large meeting involving 20+ people, resulting in some 4.6 million visitor nights.

Table 1.8

Visits, Visitor Nights and Spending by Trip Type

Visits, Visitor Nights and Spending by Trip Type			
	Visits (000s)	**Nights (000s)**	**Spend (£m)**
Business/Work	5,954	25,642	3,315
Visit to Trade Fair	215	875	214
Conference 20+ People	1,069	4,601	862
Looking for Work	55	2,506	111
Au Pair	11	1,336	13

Source: VisitBritain / 'Foresight' Issue December 2012

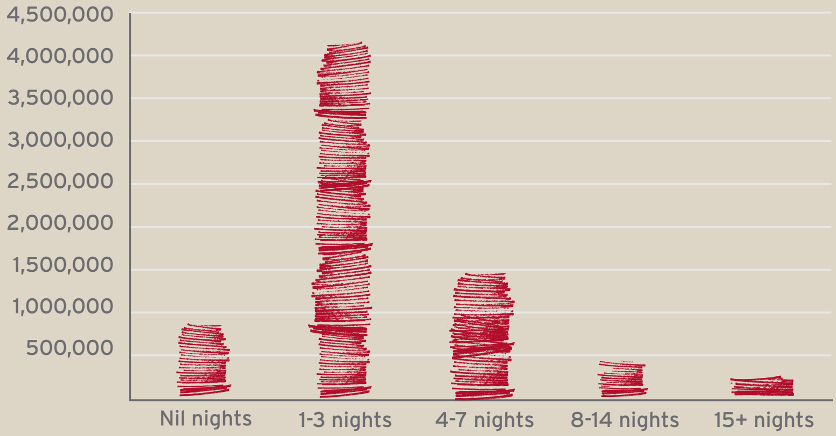
As can be seen from Table 1.8, all the major categories within the inbound business tourism market result in trips that typically last around four nights.

Figure 1.2 shows that 4.2 million business visits in 2011 lasted between one and three nights, while 1.5 million fell into the 4-7 nights category. Of note is the fact that there were just fewer than 900,000 'nil night' business trips from overseas to Britain.

One of the many benefits of having an inflow of business visits from overseas is that this ensures demand for tourism-related businesses throughout the year, with there being only modest amounts of seasonality in the volume of business trips as is clear from Figure 1.3.

Fig. 1.2

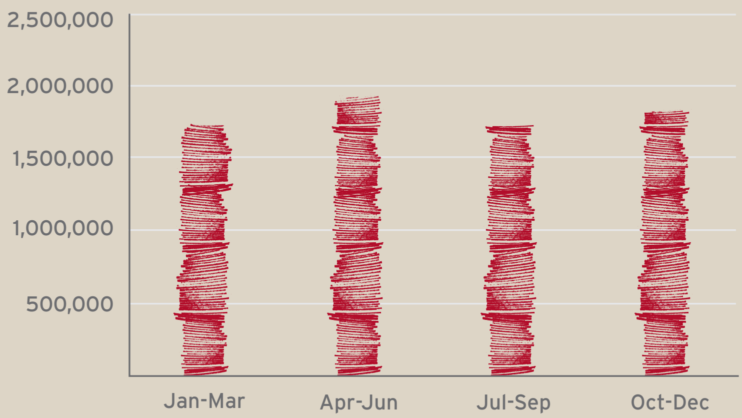
Duration of Stay (number of visits)



Source: VisitBritain / 'Foresight' Issue December 2012

Fig. 1.3

Seasonality (number of visits)



Source: VisitBritain / 'Foresight' Issue December 2012

Britain attracts inbound business visits from right around the globe. Tables 1.9 and 1.10 reveal the top source markets for overseas visitors to conferences and trade fairs respectively in 2011.

Table 1.9

Top Markets for Visits to Conferences of 20+ People

Market	Visits (000s)
USA	168
Germany	125
France	88
Irish Republic	63
Netherlands	59
Italy	41
Belgium	40
Spain	38
Denmark	34
Switzerland	32

Source: VisitBritain / 'Foresight' Issue December 2012

Table 1.10

Top Markets for Visits to Trade Fairs

Market	Visits (000s)
Irish Republic	33
France	20
Germany	19
USA	19
Italy	15
Spain	13
Netherlands	12
Denmark	7
Sweden	7
Russia	6

Source: VisitBritain / 'Foresight' Issue December 2012

This issue of 'Foresight' may be accessed free of charge at: **http://bit.ly/VPcSJL**

A new report on the UK's wider tourism sector, 'Tourism: jobs and growth – the economic contribution of the tourism economy in the UK', published by Deloitte (November 2013) and commissioned by VisitBritain, calculates that international visitors generated £24 billion of 'export' earnings in 2013, which in turn meant £6.7 billion of tax revenues for the Exchequer. The report predicts that, to 2025, there will be above average GDP growth in tourism driven primarily by international visitors – inbound tourism is projected to grow by 6.1 per cent per annum to reach total revenues of £57 billion by 2025. It suggests that tourism is now worth £127 billion to Britain.

Changing the perceptions and profile of business visits and events

We still need to increase understanding and recognition of the value that conferences, meetings and events generate in terms of professional development, knowledge transfer, investment generation, technical progress and all the other areas that define why these events happen in the first place. In reality, meetings, conventions and exhibitions are, in the words of a paper entitled 'Understanding the Value of the Meetings Industry' published by the Joint Meetings Industry Council (JMIC) in 2008:

primary engines of both economic and professional development, key vehicles for not just sharing information – something that, in many cases, can be done just as effectively on the Internet – but building the kind of understanding, relationships and confidence that can only be achieved on a face-to-face basis.

The JMIC paper describes 'three critical areas of interface which the meetings industry has with the broader economy, whether that be at a global level or in the context of an individual community'. The first of these is the economic role, described earlier in this chapter and in other chapters of this report. The second is the business development role:

which reaches far beyond the immediate effects of event-related spending. For a start, meetings, conventions and exhibitions attract business audiences that wouldn't necessarily otherwise visit a particular destination, and who are more likely to be investors and decision-makers than other types of visitors. In this way, events serve to expose the host city and its investment opportunities to a whole new audience – a process that can rival even the most highly evolved economic and investment development programmes mounted by the business community. At the same time, they provide a vehicle for local business and professional groups to host colleagues and create a showcase for local products and services, all key elements in the economic development process.

But, the paper suggests:

above all, there are the benefits associated with the community enhancement role – because these are the ones that most directly impact the largest number of people in a community. For a start, meetings and conventions create access to a wide range of professional development opportunities for local residents by making these more accessible to those in the community. Major, or even regional, gatherings bring what is often world class knowledge and expertise within the grasp of local businesses and professionals, improving overall knowledge in ways that would not otherwise be possible. When such gains are made in areas such as the medical or research fields, the benefits to the rest of the community can be very profound in terms of how they improve the overall quality of life.

But even without this effect there are ways that the community benefits in a very tangible way from the meetings, conventions and exhibitions taking place there. For a start, it justifies and in large part finances the development of facilities that can then be used for the community's own events and celebrations. But, best of all, the arrival of non-resident delegates means a lot of new tax revenues from outside of the usual local tax base which can and will be applied to supporting ongoing community services.

The paper concludes, however, by describing an even more important role, one which goes to the heart of what meetings are all about, which is:

The importance they have in bringing together diverse interests and cultures to address common challenges. Meetings, conventions and exhibitions not only support professional, research, technology and academic development – the pivotal activities that underpin global progress – but they also help build networks and bridge cultural differences that threaten world order and advancement. The simple fact is, meetings are vehicles for finding solutions to global issues – and that is something we will have no shortage of in the years ahead!

The Joint Meetings Industry Council has published two more papers providing an in-depth rationale for the benefits of conferences, meetings and exhibitions. The papers are:

- A Meetings Industry Guide to Community & Government Relations
- Speak Up! A Guide to Communicating Industry Value

They can be downloaded from the JMIC website: **www.themeetingsindustry.org/**

A conference organised by JMIC and held during the EIBTM exhibition in Barcelona (November 2013) focused on addressing the communications challenges facing the meetings and business events sector. It made a series of recommendations for future action in terms of what are the critical issues and what do the key messages need to be in order to gain traction with audiences that are impacting and will continue to impact the industry's collective future. The recommendations included:

- The importance of having a consensus and consistent industry message delivered as a 'single voice' in place of scattered initiatives that only serve to confuse key audiences
- A focus on societal benefits (medical, academic, economic) as the primary values arising from the industry in place of relying on purely financial measures
- The importance of addressing government and community priorities in order to engage their interest
- A need to build a greater level of trust and enhance relationships within the industry itself in order to create a basis for joint action
- A shift of focus onto delivering new initiatives that can be developed on a cooperative basis in place of simply revisiting past initiatives
- The importance of clearly defining what is needed to support industry development as part of the message and of providing solutions to address this
- The need to engage with mainstream media more effectively by recognising their priorities and by shaping more newsworthy industry messages, and
- A requirement to maintain an ongoing, consistent communications / advocacy effort in place of only periodic initiatives.

The All Party Parliamentary Group for Events (APPG)

An All Party Parliamentary Group (APPG) for Events has been established under the chairmanship of Nick de Bois, MP. The function of the group is to provide a dialogue between government and the organisations, associations and businesses that make up the wide scope of the UK events industry. The APPG represents the interests of the industry through the achievement of:

- Greater support for marketing and bidding for more international events to be held in the UK
- Promotion of the value of export earnings created by the industry
- The importance of greater engagement with national and local politicians
- Support for a new, all-embracing Event Industry Safety Guide (the 'Purple Guide' – see Chapter 6) to include operational guidelines
- Ensuring that the Events Sector achieves a lasting legacy from the 2012 Olympics.

Over the last five years, with the arrival of the 2012 Olympic and Paralympic Games, the Queen's Diamond Jubilee celebrations, the increasing popularity of outside events and festivals and the forthcoming arrival of the Commonwealth Games, the Group has worked with the industry to best confront the opportunities and challenges it faces, and to determine how government can support its growth in line with its own Growth Agenda.

In 2013 the APPG initiated an inquiry into the 'International Competitiveness of the UK Events Industry', the results of which were published in December 2013. The key findings, recommendations and conclusions are summarised below. It is interesting to note that, in the words of the inquiry report:

'Notwithstanding the impact that the Olympics and Diamond Jubilee had on the public and audiences from around the world, these events do not represent the wide diversity of events that take place on a daily basis; managed by professionals and attended by visitors and delegates from across the world. Nothing we found from the inquiry challenged or undermined the claim of the UK's reputation to be the world leader in the creation, staging, and production of events, be they business (brand activations, conferences, conventions, large meetings, exhibitions), cultural and music festivals, sporting events or other indoor and outdoor public events and fairs.'

Key Findings

- The industry recognised that it could be a key driver of the government's 'growth agenda' by attracting high growth industries to the UK and stimulating the discussion as to why the UK is open and hungry for business. The government could, it was determined, help the UK events industry to achieve its aspirations of growing from its present £36bn to a projected £48.4bn by 2020. In return this sector could help fuel the wider growth agenda for the nation by engaging with the key business sectors through the staging of international events
- The majority of evidence given from within the industry was not asking for financial support for the sector but for the reduction of interventions that decrease its international competitiveness
- Barriers to growth were exacerbated by the poor positioning of the business events industry within some sectors of government and, whilst industry itself was effectively representing itself to government where it was possible to do so, it still operated in silos and a more coherent industry effort was also needed
- Notwithstanding the committee receiving evidence of subvention by international competitor destinations, it was clear that the UK product is so strong and attractive to international event organisers that, despite the lack of this subvention funding, and the obvious competitive disadvantage this creates, the UK continues to win major business.

Key Recommendations

Government

- A cross-departmental approach should be established to represent the best interests of the UK events industry. Its home should remain within Tourism at the Department for Culture, Media & Sport (DCMS), but it will also have representation from the Department of Business, Innovation & Skills (BIS). The principal function of BIS is to break down the barriers created by unintended consequences of legislation or regulation. DCMS should chair a formal sub-committee with invited stakeholders from the Home Office, BIS and Department for Communities and Local Government (DCLG)
- A special 'Events Visa' should be created that will provide a more positive welcome to influential event parties travelling internationally into the UK and provide pre-approved business travellers and 'event tourists' with a more pleasant entry into the UK. This has been authorised for the Commonwealth Games but should be extended to international trade shows, consumer and business-to-business events
- A feasibility study should be set up to review the tax raising powers of local government to raise income for capital expenditure that demonstrates a net benefit return for the local community with the support of the local community by democratic consent. The Localism Act 2012 allows councils to raise funding from local taxpayers subject to approval by local referendum. It is not clear whether these powers would include major infrastructure projects – however, the principle is clearly positively established by government. A feasibility study should determine the scope of the economic impact of any investment and, therefore, the practicality of raising public funding across more than one jurisdiction, for example
- The Treasury should include, within future economic impact studies, the impact of taxation within the events industry and specifically, but not exclusively:
  - The impact of APD (Air Passenger Duty) on travel to major business and consumer events
  - The impact of VAT on business event success
- The Business Visits & Events Partnership and the 'Britain for Events' campaign should be fully recognised by government as the central and fully representative voice of the UK events industry. Representatives from country level destination marketing organisations (DMOs), with the possible inclusion of VisitBritain, should be included on the Partnership to share learning and best practice across UK destinations alongside the events industry's many trade associations
- Steps should be taken to strengthen local authorities that do not currently offer a strong and coordinated destination management service in order to both support existing events and help them to win more event bids
- Local authorities should work closely with businesses and organisations concerned with the events industry to develop a region-specific approach to subvention, not limited to purely fiscal support but providing a long term and sustainable support for returning events business
- A communication programme should be created e.g. a conference should be produced and delivered in partnership with the events industry and aimed at local authorities in order to promote the benefits of the events sector in local destinations, and to provide information and advice on subjects such as e.g. licensing and regulation, health and safety etc.

Industry

- Sharing best practice is not evident across the sector. Destination success stories should be shared throughout the UK events industry so that others can benefit. This could be coordinated through e.g. BVEP / Britain for Events and/or country level DMOs, and could include:
  - Scottish Exhibition + Conference Centre (SECC), Glasgow City Marketing Bureau (GCMB) and VisitScotland
  - International destination successes e.g. Vienna, Barcelona, Lisbon
- Industry regional partnerships should be formed with local and regional authorities. Whilst there is evidence that forward thinking local authorities have examined the return on investment (ROI) of investing in the events industry and subsequently invested where appropriate, such engagement with the industry is patchwork across the country and often on an informal basis
- Industry should fully embrace the Ministerial Support Bid initiative and closer relations with UKTI, including the newly formed UKTI Events Alliance, to ensure stronger pitches for meeting and convention business (see Chapter 5 for further information on the Ministerial Bid Support Initiative)

- Sustainability and apprenticeships are a key part of the government agenda, both as a stakeholder to the industry, but also as potential buyer. These areas should therefore be more widely embraced by the events industry
- A single professional authority, funded by the industry, with representatives from leading bodies, could help ensure a unified, coherent and consistent relationship is built with government, local authorities and regulatory bodies. This could be a better resourced BVEP to ensure the industry speaks with one voice.

Conclusions

It is clear that UK events, whilst often the victim of economic trends, is an industry that holds global respect for its creativity, people and the quality and uniqueness of its venues and destinations. UK event and exhibition agencies have grown internationally and represent success stories for the exportation of the UK creative sector.

There can be no doubt that the Olympic and Paralympic Games, alongside the Queen's Diamond Jubilee celebrations, contributed to this reputation as will the forthcoming Commonwealth Games 14 and Ryder Cup 14 in Scotland.

Balanced against this positive reputation comes a negative perception of cost and all evidence given by event organisers cited price as a key issue in not selecting the UK over other international destinations.

In short, however, this is a competitive industry and the question should therefore be, how can it be made more competitive and how can government support its growth? It should be noted that the role of local authorities here is paramount. This is a 'destination'-led industry and, whilst national representation creates cost effective and coherent umbrella support for local DMOs, it will be the individual and more localised destinations who gain most from increased activity in this industry.

Prospects of the Growth Agenda

Evidence given to this inquiry demonstrated that these events play a role in the growth agenda of this government. Events impact on UK tourism, they place the UK as a centre of business excellence, scientific knowledge and research and development.

A strong example given was the arrival of The European Society of Cardiology to London in 2015, bringing 35,000 delegates to ExCeL London. Not only will this impact positively on local businesses, it positions the UK as a central European authority on the subject.

From an infrastructure point of view, this industry also benefits from private investment as well as public, and much of the developments of venues have not impacted on the public purse.

Government Intervention

Much of the discussions that took place within this inquiry looked to focus on how government could support the industry to achieve its aspirations of growing from its present £36bn to a projected £40.8bn by 2020.

The majority of evidence given from within the industry was not asking for financial support for the sector but the reduction of interventions that reduce its international competitiveness. This included uncompetitive rates on VAT for international businesses bringing large events to the UK, to APD and cost implications for delegates and event tourists. The subject of the Schengen Visa was also raised in terms of providing a barrier for major international delegations arriving from China.

However, it should also be noted that, whilst this inquiry fully accepts the disadvantage of taxation and visa restrictions, the UK tourism economy remains vibrant and in growth and business tourism and events has the opportunity to continue to grow regardless of changes in these areas.

Evidence also pointed at areas where government could support the industry, by using ministerial and civil servant time and energy to lend support to the winning of international event business to the UK and that, through local authorities, could contribute to a better 'welcome' to the UK. The inquiry accepts that practical rather than fiscal measures have both the best chance of success and can be implemented quickly with more instant effect for the industry.

Where does the Industry sit within Government Departments?

One of the areas identified as a barrier to this growth was uncertainty over where the events industry should sit within government departments and which departments should carry responsibility for the industry. At the moment, business visits and events sit within Tourism in the Department for Culture, Media & Sport. However, given the contributions the industry makes to business, education, research and development, a strong argument was presented for it to sit within other areas of government.

Raised within this dialogue, however, was the need for the industry to have a natural champion and the danger that it would sit between too many different sectors.

How does the Industry represent itself?

It has to be noted that it is in this area where the events industry is most inconsistent. The UK events industry is vast and covers a wide range of different kinds of events, across a myriad of different sectors. It was challenged that the industry needs to represent itself more cohesively to ensure it presents a united voice to all its stakeholders, not just to government.

In previous years this coherent voice was covered by VisitBritain and the BVEP (for governmental communication). However, as a result of the Comprehensive Spending Review (CSR) in 2009, VisitBritain pulled out of business tourism and no longer represents the sector in any meaningful way.

This inconsistency was further demonstrated through evidence submitted by John Penrose MP who raised the subject of the Ministerial Bid Support initiative where the DCMS put in place a resource for event organisers to request ministerial support for major event bids. Since its introduction in 2011, only one official request has come from the industry. NB. This has recently been rectified with VisitEngland taking responsibility for the initiative with good early success (two pieces of confirmed business and increased industry requests for ministerial support).

It was agreed that the existence of the Business Visits & Events Partnership was a positive move for the industry but that more organisations should support and engage in the partnership.

Consistency of the UK Event 'Product'

One of the areas that caused interest amongst the inquiry was that of the differing level of understanding, interest and quality from destinations across the UK. Whilst the UK does lose out to international destinations for major events businesses, it was interesting to see Glasgow and Edinburgh cited by panellists as excellent examples of best practice, whilst other destinations were not so sophisticated.

Green and Sustainability Issues

It was also noted by the inquiry that outside of evidence submitted by a particular organisation, there was very little mention of the sustainability and environmental impact of the industry.

This is despite the UK positioning itself as global leader in this area on the back of the 2012 London Olympic & Paralympic Games. The UK established the ISO20121 accreditation that is being exported to the Games in Brazil, again underlining the global respect for the UK industry.

This is an area the industry needs to address quickly. The very essence of face-to-face marketing encourages people to travel both domestically and internationally, and the industry should make steps to present a sector that is aware of both its negative and positive impacts on the environment.

Subvention

An area discussed at length during the inquiry was subvention; the act of supporting major event bids by purchasing venue space, ancillary services, entertainment or travel for delegates as part of an incentive package from destinations to major event organisers. The inquiry found that this is an area where the UK is uncompetitive and that other international destinations (Paris, Vienna, Lisbon) are able to 'buy' event business ahead of the UK.

Regardless of this, it was clear that the UK product is so strong and attractive to international event organisers that, despite the lack of this subvention funding, the UK continues to win major business. In fact, it was commented by one witness that subvention monies would be better spent e.g. building a central London International Convention Centre instead. It was also suggested during the inquiry that the act of subvention was a risky one in the long term, as government money was not always guaranteed and that taking away such support would impact immediately on bid wins.

The full APPG inquiry report may be accessed at:

www.businessvisitsandevents partnership.com

CASE STUDY

Eventia-IVCA Achieves Breakthrough Agreement on TOMS

This case study highlights the importance of lobbying and patient, behind-the-scenes negotiation to achieve legislative improvements for the events sector.

In September 2013 it was reported (**www.myvenues.co.uk** – 26/9/13) that the Eventia-IVCA Regulation Committee had achieved a significant breakthrough agreement with Her Majesty's Revenue & Customs (HMRC) on VAT accounting for events. Until that time, agencies managing events that fell within the ambit of the Tour Operators Margin Scheme (TOMS) accounting were required to pay VAT on the full amount of the travel element, despite their VAT-registered clients being unable to recover the VAT. This had created an unfairness and anomaly compared with VAT accounting in other parts of the European Union, putting UK agencies at a competitive disadvantage.

Negotiations over 18 months with HMRC enabled Eventia-IVCA to announce that, from September 2013, it would be possible for agencies to issue VAT invoices on the 'non TOMS' element (known as 'in-house supplies') of an event. This overturned many years of HMRC practice.

Commenting on the agreement with HMRC, Brian Kirsch, Eventia-IVCA Regulation Committee Chairman, said

'We are delighted to have reached this milestone agreement with HMRC. It sounds very dull and technical, but this change will be of immediate benefit to agencies wanting to compete in the European market, and who want to account for VAT correctly.'

The Eventia-IVCA Regulation Committee continues to work with HMRC on other TOMS issues, including whether minor TOMS elements in an event can be disregarded, and more fundamentally whether business to business (B2B) transactions should be in TOMS at all.

www.eventia-ivca.org

Chapter 2

Creativity is GREAT

The Global Competitve Landscape

The Global Competitive Landscape

Television news items featuring the competition between cities across the world to host major sporting events such as the Olympic Games and the Football World Cup have familiarised us with the notion that success in bidding to stage these events can only be achieved through lengthy, sustained, expensive, and high-profile activity. Images of bidding teams assembling weighty bid documents and support materials, often running to hundreds of pages, reinforce the research, hard work and professionalism needed to stand any chance of success. Scenes of elation on the part of the successful bid teams are balanced by the desolation of those who are unsuccessful, their disappointment the only fruit of what may have been a bid campaign lasting years rather than weeks or months. Fortunately, there are relatively few events demanding this scale of bid activity, although the principles underlying such activity are equally applicable to bids for whatever size of event.

It is undeniably the case that we live in a global marketplace and competition from other destinations, both cities and countries, grows fiercer continually. Chapter 1 in this Report describes some substantial investments in the UK's physical product designed to attract major events to these shores. Other parts of this Report describe additional forms of investment (in quality and standards, education and training and skills development, marketing, innovation and creativity, for example) being made to strengthen and secure the UK's 'offer' in this highly competitive, dynamic international industry.

A BVEP paper 'Opportunities for Growth in the UK Events Industry: Roles and Responsibilities' (published October 2011 and downloadable from the BVEP website) states that:

'The UK is considered generally to be an expensive destination with a fragmented convention industry but we should seek to build on the key strengths that are inherent in the UK events industry. These include geographic location, quality and variety of venues with exceptional green credentials, the English language and Britain's strong science and medicine pedigree.'

Within the related fields of travel and tourism, there was both good news and bad news about the UK's competitiveness in the World Economic Forum's *'Travel & Tourism Competitiveness Report 2013 – Reducing Barriers to Economic Growth and Job Creation'* (published in March 2013). The good news is that the UK improved its position from seventh to fifth in terms of our overall competitiveness (out of 139 countries) – this shows continuous improvement in the four years since 2009 when the UK occupied 11th position. Table 2.1 shows the UK's competitive performance in a number of travel and tourism-related categories, many of which also impinge closely on the business visits and events sector.

Table 2.1

UK Competitive Rankings in Travel and Tourism (out of 139 countries)

Category	2011 Ranking	2013 Ranking
Overall competitiveness	7	5
Policy rules and regulations	13	8
Prioritisation of tourism	49	40
Tourism infrastructure	19	22
Affinity for tourism	86	45
Ticket prices and airport charges	134	139
Visa requirements	22	46
Effectiveness of marketing	43	21
Attitude towards visitors	74	55

Source: World Economic Forum's Travel & Tourism Competitiveness Report 2013

The Tourism Alliance suggests that these rankings provide evidence that the Olympics 2012 and associated marketing activities have helped to improve the UK's international competitiveness. It adds, however, that, while the Government has given greater priority to tourism, there are still significant problems with taxation, air passenger duty (APD), visas (but see also later in this chapter) and the UK's tourism infrastructure

The nature of Global Competition

Competition from other countries and destinations can take many forms, from higher marketing budgets to greater levels of infrastructure investment, from more client-friendly policies and laws to a more professional and better supported approach to event bidding. One or two examples help to put the scale and nature of the global competition for events business into context:

- Huge investments have been made and continue to be made in facilities and infrastructure by many countries. In the Persian Gulf, Abu Dhabi and Dubai have led the way while, in Qatar, the Qatar National Convention Centre was opened in 2011 at a cost of US$ 1.2 billion (approximately £700 million). Oman will add to the competition from this region when it opens the new Oman Convention & Exhibition Centre in 2016 (see case study on page 41)
- In January 2013, the Malta Tourism Authority announced a new annual subvention fund of Đ100,000 to attract international association meetings. Associations must meet various criteria to receive financial help, but a contribution of Đ10,000 will be available to those that qualify
- Malaysia aims to increase business tourism arrivals from 1.2 million to 2.9 million by 2020 and has a conference subvention budget of US$ 7.5 million a year to help. Totally funded by central government, the Malaysian Convention & Exhibition Bureau (MyCEB) operates with a budget of US$ 15 million of which 50 per cent is devoted to the subvention programme.
- The global nature and growth of the international conference and events sector is well demonstrated by the evolution of one of the industry's major trade shows, IMEX, which is held in Frankfurt in May each year. The first IMEX was held in 2003 and, in that year, 119 countries were represented as exhibitors; by 2011 this number had increased to 160 countries. In 2003 there were 5,624 visitors to the show (including hosted buyers) drawn from 80 countries. In 2011 there were 8,944 visitors drawn from 86 countries. While just nine countries supplied 77 per cent of these visitors (Belgium, France, Germany, Italy, Netherlands, Russia, Spain, Switzerland, United Kingdom, USA), a further five countries supplied over 100 visitors each: Austria, Brazil, China, Poland, and Sweden, clearly demonstrating the strength of the business events sector in globally dispersed destinations.
- The Union of International Associations (UIA) publishes annual rankings of international meetings held in 185 countries around the world. While not all of these countries are active marketers in terms of winning such meetings business, many are and this number increases constantly. The tables below, from both the UIA and ICCA (International Congress & Convention Association) illustrate the UK's market share in this sector of major events business.

UIA Country and City Rankings 2012

The UK has enjoyed significant success in attracting major sporting events, described further in other parts of this Report, but comparative data is not available to show how successful the UK has been in securing events against international competition for many of the other individual segments of business visits and events. There is, however, well established research into the staging of international association and international governmental conventions and conferences, published annually by the Union of International Associations (UIA)and the International Congress & Convention Association (ICCA). While the UK has different rankings in the two datasets for 2012 (different criteria are used – see below), both suggest that there is still 'room for improvement'. Recommendations for achieving such improvements are listed later in this chapter.

The Union of International Associations' (UIA) rankings cover meetings under three headings:

i) 'A' Heading – Meetings of International Organisations
    - organised or sponsored by 'international organisations' i.e. international non-governmental organisations (NGOs) and intergovernmental organisations (IGOs) included in the UIA's Yearbook of International Organisations
    - with at least 50 participants, or number of participants unknown

ii) 'B' Heading – Other International Meetings (3 days)

- meetings not organised or sponsored by 'international organisations' but nonetheless of significant international character, notably those organised by national organisations and national branches of international organisations
- at least 40 per cent of the participants are from countries other than the host country and at least 5 nationalities are represented
- lasting at least 3 days, or of unknown duration
- with either a concurrent exhibition or at least 300 participants.

iii) Other International Meetings (2 days)

- meetings not organised or sponsored by 'international organisations' but nonetheless of significant international character, notably those organised by national organisations and national branches of international organisations
- at least 40 per cent of the participants are from countries other than the host country and at least 5 nationalities are represented
- lasting at least 2 days, or of unknown duration

with either a concurrent exhibition or at least 250 participants.

The table below combines 'A' and 'B' meetings. Out of a total of 349,089 meetings in the UIA database which meet the criteria for inclusion in the UIA's 'International Meeting Statistics for the year 2012' (published June 2013), 10,498 took place in 2012, and 6,298 are scheduled for 2013 or later.

ICCA Country and City Rankings (2012)

The ICCA rankings (published May 2013) cover meetings organised by international associations which take place on a regular basis, attract a minimum of 50 participants and rotate between a minimum of three countries. This year ICCA identified more than 11,500 events which took place in 2012.

Table 2.2

Top International Meeting Countries and Cities in 2012 - UIA

Number of meetings per country			Number of meetings per city		
Ranking	Country	No. of meetings	Ranking	Ranking	No. of meetings
1	Singapore	952	1	Singapore	952
2	Japan	731	2	Brussels	547
3	USA	658	3	Vienna	326
4	Belgium	597	4	Paris	276
5	Republic of Korea	563	5	Seoul	253
6	France	494	6	Tokyo	225
7	Austria	458	7=	Barcelona	150
8	Spain	449	7=	Copenhagen	150
9	Germany	373	9	Madrid	149
10	Australia	287	10	London	119
11	United Kingdom	272	11	Stockholm	113
12	Italy	262	12	Budapest	107
13	Canada	228	13	Sydney	103
14	Netherlands	177	14	Helsinki	102
15	Denmark	175	15	Lisbon	93
16	Switzerland	166	16	Geneva	90
17	Sweden	165	17	Berlin	89
18	Norway	164	18	Kuala Lumpur	88
19	Finland	160	19	Istanbul	87
20	China	155	20	Kyoto	84

Source: Union of International Associations – **www.uia.org** Email: uia@uia.org for further information

Table 2.3

ICCA country and city rankings measured by number of meetings organised in 2012

Number of meetings per country			Number of meetings per city		
Ranking	Country	No. of meetings	Ranking	Ranking	No. of meetings
1	USA	833	1	Vienna	195
2	Germany	649	2	Paris	181
3	Spain	550	3	Berlin	172
4	United Kingdom	477	4	Madrid	164
5	France	469	5	Barcelona	154
6	Italy	390	6=	London	150
7	Brazil	360	6=	Singapore	150
8	Japan	341	8	Copenhagen	137
9	Netherlands	315	9	Istanbul	128
10	China - P.R.	311	10	Amsterdam	122
11	Austria	278	11	Prague	112
12	Canada	271	12	Stockholm	110
13	Australia	253	13	Beijing	109
14	Switzerland	241	14	Brussels	107
15	Sweden	233	15	Lisbon	106
16	Republic of Korea	229	16	Bangkok	105
17	Portugal	213	17=	Helsinki	100
18	Argentina	202	17=	Seoul	100
19	Belgium	194	19	Buenos Aires	99
20	Denmark	185	20=	Budapest	98
			20=	Rome	98

Source: ICCA Data (**www.iccaworld.com**)

According to the 'AMEX 2013 Meetings Forecast', the top ten European cities for meetings (based on their clients' preferences) position London as the most popular destination - these will be mostly corporate rather than association clients. The full rankings are shown in Table 2.4

Table 2.4

Top European Cities for Meetings and Events Based on Number of Meetings Hosted

1	London
2	Paris
3	Amsterdam
4	Barcelona
5	Brussels
6	Nice
7	Berlin
8	Frankfurt
9	Rome
10	Munich

Source: AMEX Meetings & Events Destination Analysis, November 2012

Buyers' Expenditure on Events

Research conducted for the 2012 EIBTM trade exhibition held in Barcelona in November 2012, entitled 'IBTM European Research', ranked the UK in sixth position among the top ten countries in Europe for events expenditure. The 1,037 respondents for the research were primarily agencies/third party intermediaries (77%), with corporate buyers (14%), not-for-profit organisation buyers (4%) and other categories (5%) making up the other contributors. Table 2.5 shows the full rankings and also details the average spend on events in the respective countries by the buyers.

Table 2.5

IBTM European Research among Buyers

Buyers' Top 10 Countries in Europe for Events	Average Spend $US
Monaco	207,823
Malta	195,972
Germany	183,903
Poland	183,571
Ireland	179,244
United Kingdom	178,969
Russia	172,852
France	170,029
Spain	164,020
Turkey	154,902

Source: IBTM European Research

The figures on spend were extrapolated from an average of 262 delegates per event. In terms of the most popular countries by volume of events in 2011-12, the UK was ranked third after Germany and France. The other positions were occupied by Spain (4th) and Italy (5th), followed by Poland, Portugal, Switzerland, Sweden and Turkey.

The need to spend wisely has led to the use of new destinations that are perceived to offer better value for money, such as Croatia, Slovenia, Estonia and Albania. Sixty-three per cent of buyers were predicting increased use of new destinations in 2013.

In terms of future trends, the survey highlighted the importance of the US$ 150 billion Chinese meetings market. The findings also showed that CIVETS countries (Colombia, Indonesia, Vietnam, Egypt, Turkey and South Africa) would be looming large on international meetings buyers' radars in coming years.

VisitBritain support for the events industry

In October 2013 VisitBritain outlined its commitment to add value to existing activities by national bodies as part of delivering its 'Golden Strategy' for the period 2012-2020. The strategy acknowledges that business tourism remains a significant component of international tourism to the UK and is performing strongly. It states that events boost Britain's image and business travellers are a ready audience for activity which promotes an extension of their stay in Britain for leisure activity.

The report also highlighted the potential of the sector to grow the current event attendee expenditures of £36 billion to £48 billion in 2020, all from an industry that constituted 24 per cent of all overseas visits to Britain in 2012 and accounts for seven million international business visitors.

In a paper presented to the Business Visits & Events Partnership, VisitBritain defines its role and positioning in growing business visits and events as:

1. Providing support for major bids, as and when appropriate to do so. Working with bidding partners, this will be through letters of support and the provision of in-kind marketing promotion (e.g. media, digital, retail and social)
2. Using VisitBritain's overseas offices to provide insights, trade engagement and bid support in-market to assist the promotion of business visits and events, and business extender travel
3. Profiling incentive travel where opportunities exist as part of a strategy to build the luxury market
4. 'Events are GREAT Britain' has provided an example of the way in which the GREAT campaign can be broadened to address business tourism, having brought together VisitBritain, the GREAT programme team, and the sector. This offers an example for future partnership working. There are further opportunities for VisitBritain to work with the sector to exploit the involvement of UK Trade & Investment (see also Chapter 4) and the Foreign & Commonwealth Office with the GREAT campaign

5. Continue to be active in pressing for improvements to the UK visa regime.

In addition, the industry and the 'Britain for Events' campaign will seek to work with VisitBritain to grow the offering of business extenders' programmes and pre- and post-event visits, through tie-ups with the VisitBritain online shop as well as co-ordinating with VisitBritain and UK Trade & Investment on a corporate programme using elements of the GREAT programme and VisitBritain's "You're Invited" campaign to encourage UK businesses to invite their overseas contacts to hold meetings and events in Britain.

BVEP has welcomed the positive contribution that VisitBritain can make to the events industry, commenting: 'There is a great deal of excellent work being done at country, region and city level, but the resource of the national tourism organisation for Britain with its strong network of overseas offices and invaluable market insights should add more opportunities to attract more events and attendees to Britain.'

Subvention and bid support for UK events

The extent to which the UK and UK destinations may be placed at a competitive disadvantage because of the levels of support offered by key competitors when bidding to attract major international events was assessed in a report entitled 'Subvention and Bid Support Practices for International Conferences and Events in Britain', published by BVEP in 2011 (and available for free download from the BVEP website). The report also gave an indication of the costs and missed opportunities resulting from failed bids. It included industry and stakeholder recommendations for how the UK could/should respond to such competitive challenges through new policies and types of practical support that would help UK destinations and venues to increase their success ratios from international event bids. It provided important guidelines on how to develop a cohesive approach to event bidding by local and central government agencies. Many of the recommendations are still relevant in 2013-4, and these are summarised below (together with updates on progress made).

The key objectives and uses for subvention are as follows:

1. To attract high yield, high spend international conferences linked to UK areas of expertise in industry, commerce or science and medicine, to boost the economy and benefit inward investment
2. To enable UK cities and destinations to be competitive within the international conference market
3. To attract additional international conferences that may not be attracted without subvention, thereby boosting UK levels of international conferences to be more in line with those of other major European and international destinations.

It is clear from the research which underpinned the Subvention and Bid Support Practices report that the UK and UK destinations are at a competitive disadvantage when bidding for major international conferences and related events. Competition from new and emerging destinations, as well as from existing key competitors, will only increase in the years ahead. If we are to arrest and reverse the UK's slide down the league table of top international conference destinations, we must face and address the commercial and competitive realities in ways that enable us to maximise our chances of success.

This is not just a question of money (subvention). We can and must:

- improve the other forms of support that we offer to international associations
- be innovative and creative
- adopt a more effective joined-up approach
- and demonstrate a real hunger to win more international conference and events business.

The legacy from staging such events is not just in the direct and immediate economic impact generated. It is also in the long-term benefits they provide and in their ability to position the UK at the very forefront of knowledge exchange in the emergent knowledge economy, in professional development and technical advancement, in employment creation, and in new investment, innovation and technology transfer.

We also know from earlier research that up to 40 per cent of business visitors to the UK can be expected to return, often with their families, as leisure visitors, extending and increasing the economic benefits arising from their initial experience as a conference visitor.

Recommendations

1. **The Events Industry** should continue to raise national and local government understanding of the benefits and direct and indirect value that accrue from hosting international conferences, business and cultural events in the UK

2. **The Events Industry** should encourage and increase national and local government commitment to provide in kind support for event bids, especially when the qualifying event is beneficial to economic growth, scientific and industrial advancement, inward investment, employment and exports, either nationally or in the host destination

3. **The Tourism Unit at the Department for Culture**, Media & Sport should publish and disseminate across government departments a Ministerial Support Initiative Paper to include the timely provision of support letters, assistance on bids and attendance at events

4. **The National Tourism Agencies**, **supported by UKTI**, should develop, through a nationwide business tourism forum, a national bid support best practice paper to facilitate information sharing and identify local support across leading conference and event destinations

5. **Tourism representative bodies** currently engaged in VAT reviews should include the potential of reduced rates of VAT for organisers of inbound international congresses and more generally on conference services and venue hire for international events

6. **The UK Borders Agency** should introduce special event visas for attendees of business events and conferences where there are over 2,000 overseas delegates.

It is encouraging to record that, in October 2013, a Ministerial Bid Support Initiative was launched to provide more timely and better coordinated support for international event bids from government ministers. Further details are given in Chapter 5.

CASE STUDY

The Oman Convention & Exhibition Centre

Following the huge investments in business events infrastructure in Abu Dhabi, Dubai and Qatar, further competition from this area of the world will be stimulated by developments in Oman. Scheduled to open in late 2016, The Oman Convention & Exhibition Centre, under construction on a greenfield site near the capital Muscat, will have a main auditorium able to accommodate 3,200, while 14 meeting rooms will accommodate from 70 to 360 people – and it will be located within a fully supported convention hub. The Centre will be just four kilometres from Muscat International Airport. The fully integrated precinct, 1.8 kilometres from one end to the other, will also house one five-star, two four-star and two three-star hotels, making 1,000 rooms in total, a commercial precinct and a shopping mall. All are designed to meet US Green Building Council LEED (Leadership in Energy and Environmental Design) certification. The precinct overlooks a nature reserve and a water-filled wadi (valley) which provide a wonderful haven for Oman's birdlife.

The Oman Convention & Exhibition Centre is already reaching out to international meeting planners in a move to build awareness and promote the under-development venue—and the Sultanate of Oman itself—for large-scale meetings and events.

Figure 2.1

Oman Convention & Exhibition Centre

The venue operator, AEG Ogden, together with the Ministry of Tourism, has been actively targeting key decision-makers worldwide. After promoting the Oman Convention & Exhibition Centre at global industry trade shows, a delegation from the Oman Ministry of Tourism and venue representatives has undertaken the first in a series of exclusive client events in Paris, Geneva, Brussels and London in 2013. The delegation included Oman Embassy Ambassadors, Directors of the Ministry of Tourism and their representatives in each city location, as well as Oman's leading sportsman, Ahmad Al Harthy, the 2012 Porsche Carrera Cup Great Britain Pro-Am 1 Champion. More than 80 clients with the potential to bring 65,000 convention delegates to Oman attended these presentations in key European markets.

Oman's Director General of Tourism Development, Mr Salim Al Mamari, said:

'Many of these (client) decision makers are looking for something a little different and unique to 'globalise' their conventions and, at the same time, grow their membership. Oman ticks both of these boxes.'

Chapter 3

Events are GREAT

The Composition of the Events Industry

Events support...

This chapter examines in detail the individual segments that make up the events 'industry', looking at their key characteristics and trends, volume and value data, issues affecting future growth, etc.

The business to business (b2b) sector can be characterised as extremely dynamic and an arena that embraces a wide spectrum of live events providing creative and valuable solutions for corporate customers. Solutions that show events are now used very much as experiential brand experiences delivering powerful and effective marketing and communication messages right across the board.

The events organised range from off-site board meetings and company AGMs to association meetings, large scale medical and scientific symposia, major product launches through to opening and closing ceremonies for worldwide events, such as the Olympic Games.

However, the events sector is not confined to business to business events. There are also business to consumer (b2c) events as well as an array of leisure events ranging from sports to music to other cultural events, both indoor and outdoor.

The sector could not function without the myriad of suppliers who deliver products and services to ensure that events are staged successfully and profitably. The different types of suppliers are also described in this chapter

A) Knowledge is GREAT : Conferences and Meetings

Value to the UK visitor economy in direct spend: £19.9 billion

Definition and Background

In common with other industries, the conference and meetings industry comprises 'buyers' and 'suppliers'. The buyers in this case are conference organisers and meeting planners who buy or, more accurately, hire conference venues and related services in order to stage their events.

Most people within the conference industry refer to two broad types of buyer: 'corporate' and 'association'. There are also 'public sector' buyers who may be regarded as a discrete group, rather than being subsumed within the 'association' category. There is also a category of risk-taking, entrepreneurial conference organiser (sometimes known as commercial conference organiser) who puts together a conference and hopes to be able to attract sufficient delegates for the event to be profitable. All of the above may also employ the services of various kinds of 'agency' or intermediary to assist them in the staging of their events.

The term 'corporate' is used to describe conference organisers (often called meeting planners) who work for corporate organisations. Corporate organisations are companies established primarily to generate a profit and thus provide a financial return for their owners, whether these are the proprietors of a family-run business or the shareholders of a large publicly quoted company.

The term 'association' organiser or buyer covers those representing a wide range of organisations, including:

- Professional or trade associations/ institutions (whose members join because of their employment)
- Voluntary associations and societies (whose members join primarily to further an interest or hobby)
- Charities
- Religious organisations
- Political parties
- Trade unions.

Associations are formed and operate at different levels. Many are purely national and restrict their memberships and their activities to one particular country. But, and perhaps increasingly in our global, shrinking world, these national associations are establishing links and relationships at a continental level to form bodies with memberships and spheres of influence at this wider, regional level (e.g. the European Federation of ….or the Asian Association of ….). In other cases, truly international associations exist whose members are drawn from all corners of the world.

The public sector (sometimes referred to as 'government') has much in common with the association sector (and indeed, for research purposes, is often subsumed within data for the association sector), covering organisations such as local authorities, central government departments and agencies, quangos, educational bodies, and the health service.

The fourth type of buyer is one whose role is essentially that of an entrepreneur operating within the conference sector. In other words, someone who identifies 'hot topics' in the business or academic world and then plans and produces a conference at which the topics can be presented, discussed and debated by high profile speakers and experts. The entrepreneur aims to sell places at the conference to anyone interested in paying to attend.

The suppliers to the conference and events sector include a multiplicity of organisations, ranging from conference and event destinations and venues to specialist agencies and contractors, accommodation providers, transport companies and a myriad of niche operators.

Additional information on the structure and characteristics of the conference and meetings segment of events is given in the first edition of the 'Britain for Events' report, available for free download from the Business Visits & Events Partnership website (**www.businessvisitsandeventspartnership.com**). This second edition will, therefore, focus on the current and emerging trends facing the segment.

Key Sectors of the Economy for Meetings and Conferences

While meetings and conference activity is to be found in all industry sectors, those which have traditionally been prominent in generating such activity include:

- oil, gas and petrochemicals
- medical and pharmaceuticals
- computing/IT and telecommunications
- automotive manufacturing and other manufacturing
- financial and professional services
- food, drink and tobacco
- travel and transport.

New industries and technologies expected to be important drivers of future meetings and conferences include:

- Creative industries, art, architecture & design, marketing, media, film, photography, music and the arts, publishing
- Renewable energy
- Robotics
- Biotechnology & specialist sciences
- Electronic currency & finance
- Education – distance learning – virtual universities
- Security.

One of the emerging trends in recent years, and one almost certain to grow in the future, is the strategy being adopted by many UK cities (along with many overseas destinations) to align their bidding for events with the strengths of their particular local economy. For example, London & Partners (London's destination marketing organisation) has now set its sights on growing four specific industries: technology, life sciences, the creative industries, and financial/banking/business services. Through inward investment, it hopes to make London a world leader in these sectors – and an integral part of its strategy includes attracting high profile international events. Tracy Halliwell, Director of Business Tourism & Major Events for London & Partners, is quoted in the September 2013 issue of 'Meetings & Incentive Travel' magazine, as saying:

'We have taken the four sectors London is already strong in. If we can attract more events in that space we'll get more support from the city to bring them in. Meetings and events can support foreign direct investment and growth in these sectors, have a take-up effect on study and create and support new jobs. We know our enquiries brought £100 million to £120 million in economic benefit in the Olympic year and we have a target of 8 to 10 per cent growth this year.'

In February 2013 Birmingham announced that it was considering taking political conferences off its agenda post-2014 in favour of hosting events more aligned with the city's economic growth, and designed to maximise investment opportunities with a range of events. Sir Albert Bore, Leader of Birmingham City Council, said at the time:

'Looking beyond 2014, we are aiming to attract events in sectors the city is also targeting for investment. These events will bring industry leaders and decision makers to Birmingham, creating opportunities for us to showcase the city's offer as a business destination. This will ensure that events held here act as a catalyst for the city's economic growth.'

In Manchester, Steven Small, Head of Business Tourism at Visit Manchester, writes (September 2013, 'Conference News'):

'In the North West we understand the value of business events, not only as a direct contributor to the local economy, but as a way of highlighting the region's strength in key academic and industry sectors. These events attract leading academics, industrialists, business people and entrepreneurs and are a great way to showcase the region and help attract investment and trade.'

Corporate and Association Meeting Perspectives

Annual research among both UK corporate and association meetings buyers is undertaken by The Right Solution on behalf of CAT Publications and published as the 'British Meetings and Events Industry Survey' (**www.meetpie.com/bmeis**). The latest edition, with 2014 in its title, was published in November 2013. The respondents from the association or 'not for profit' sector were made up as follows:

- 65% professional and trade associations and institutions
- 12% government or public sector organisations
- 23% other not-for-profit organisations such as charities, political parties, religious groups and trade unions.

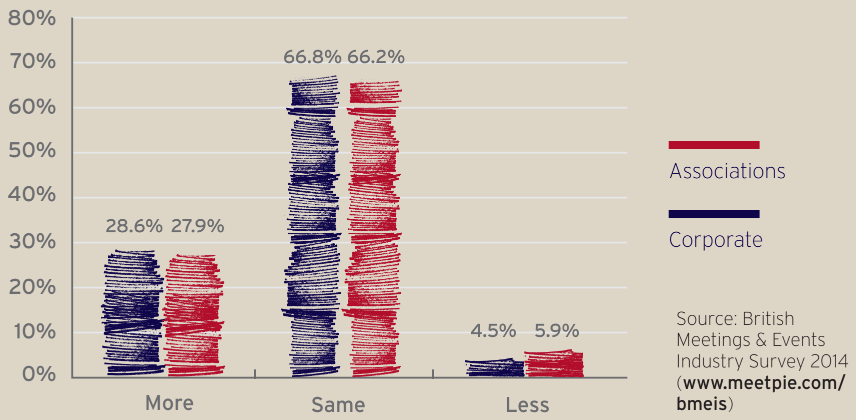
Some of the key findings of the research include:

Volume of Events Anticipated to August 2014

The average number of events organised in the twelve months to August 2013 by those in the association/not for profit sector was 37, significantly up from the average of 29 of the previous year, and for the corporate sector was 48, also up from the previous year's average of 43. Figure 3.1 shows the anticipated number of events to be organised in the twelve-month period to August 2014.

Fig. 3.1

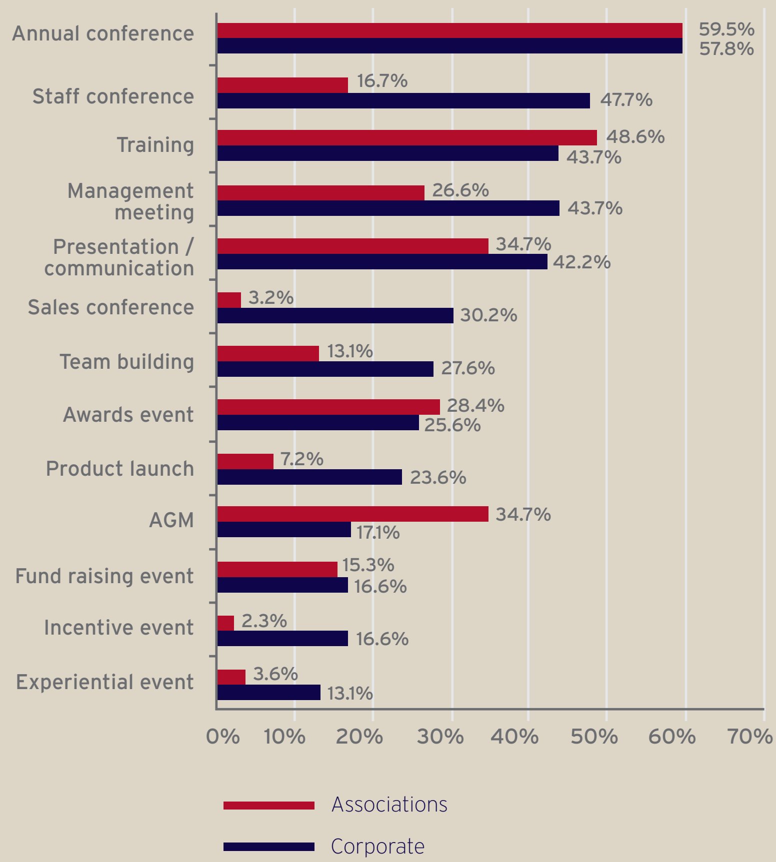
Volume of Events 2013-4 (12 months to August 2014)



Source: British Meetings & Events Industry Survey 2014 (**www.meetpie.com/bmeis**)

Fig. 3.2

Types of Event Organised



Source: British Meetings & Events Industry Survey 2014 (**www.meetpie.com/bmeis**)

Types of events held

There are differences in the types of event organised but, for both corporates and associations, the most frequent type of event held was their annual conference, closely followed by training, presentation/communication events and management meetings - very similar results to the previous survey. Figure 3.2 gives further details.

Number of delegates attending events

Associations

The average number of delegates attending the main annual conference for the association sector was 437 in 2012-3, slightly lower than the previous year's figure of 443. Their mean number of attendees at regular events was 145; also lower than 204 previously. However, most associations' 'other' events are for fewer than 200 people.

Corporates

Although only 9 per cent of corporates said the numbers of delegates at their events had reduced in the previous twelve months, the mean number of delegates at their annual conference was 378, slightly lower than 393 for the previous year, and for regular events was 127, also lower than 151 in the previous year. The majority of events are for fewer than 200 people, with 56 per cent saying their events were for fewer than 100 delegates.

Percentage of residential events

The mean percentage of events that were residential for the not-for-profit sector was 26 per cent, and for the corporate sector a very similar figure at 27 per cent. 91 per cent of associations and 83 per cent of corporates said the percentage of events that were residential had stayed the same. Just 4 per cent of associations and 9 per cent of corporates said the percentage had increased.

UK destinations used for events in 2012-2013

Since the survey began, London has been the most used destination for both corporate and association sectors, with Birmingham and Manchester remaining in the number two and three positions - very similar responses were received for the 2014 survey. Glasgow was in fourth position and Leeds in fifth with Edinburgh in sixth position. Cambridge was at number 7, clearly showing the influence of universities on associations' destination selection with influential academics and ambassadors and the increasing benefits of its strong technology sector. Nottingham saw a rise to number 10 position from 15 the previous year and Coventry was up to 9 from 14 the previous year.

Associations listed 82 other destinations with those most frequently mentioned including Reading, Leicester, Loughborough, Dundee, Northampton, Stratford on Avon, Sheffield, Inverness and Warwick. Corporates listed 63 other destinations with the most frequent including Leicester, Reading, Southampton, Telford, Portsmouth, Ipswich and Dundee.

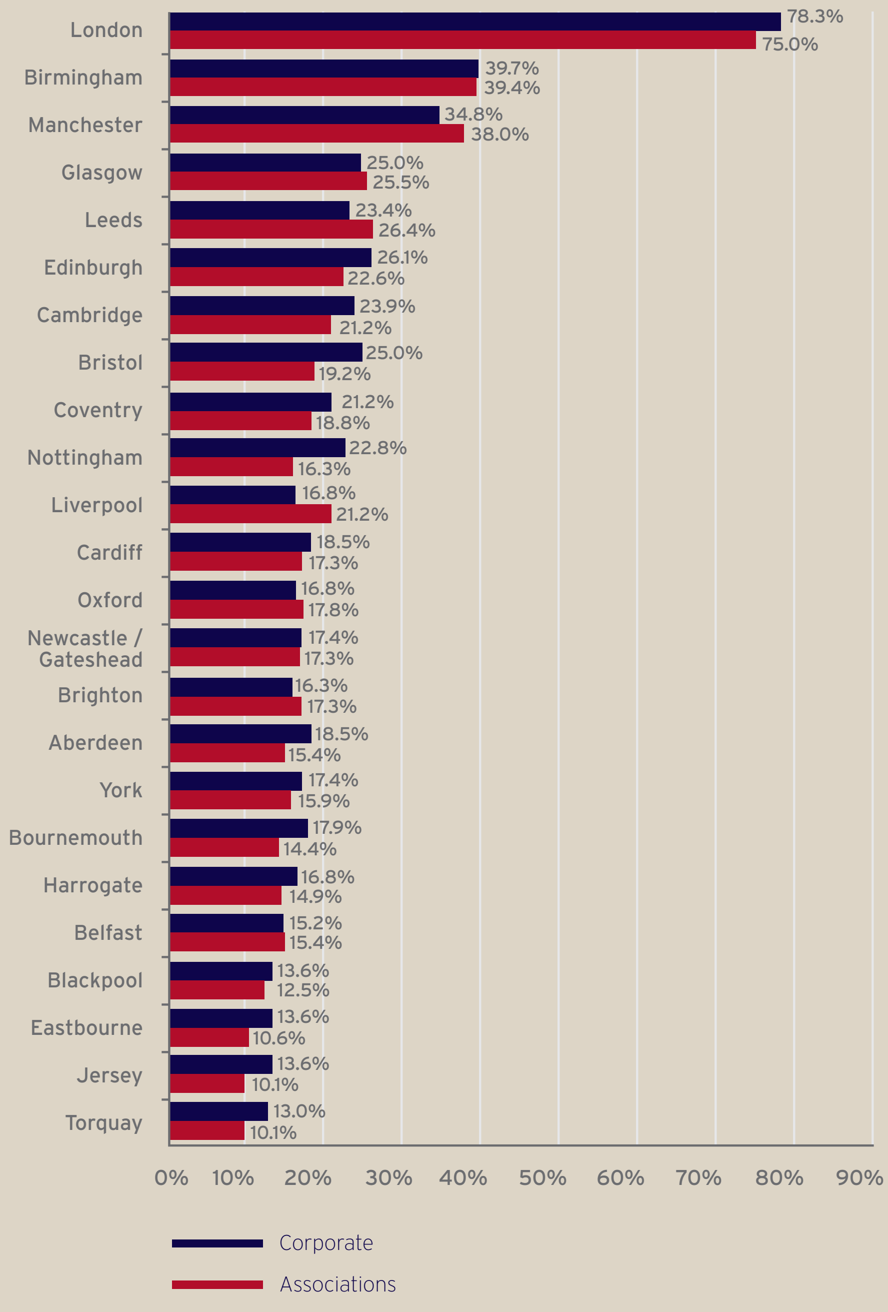
Figure 3.3 ranks the UK destinations used most often for events, illustrating the percentage of respondents who had held events in each location. Respondents had often held events in many locations.

Influences on destination selection

The importance of colleague and peer group recommendations in the choice of event destinations was confirmed by the research. Figure 3.4 reveals that over 50 per cent of both corporate and association organisers say that they make a selection in conjunction with colleagues. Despite the use of so many different destinations, up to a third of association and corporate organisers said they opt for a destination they have used before. Associations are more likely to be influenced by an advisory committee yet less than 10 per cent say they are influenced by their PCO or event management company. Interestingly, fewer than 5 per cent said that subvention influences their decision, despite the increasing presence of subvention in such a competitive market. Ambassadors influence around 4 per cent (N.B. they can be more influential for international association destinations).

Fig. 3.3

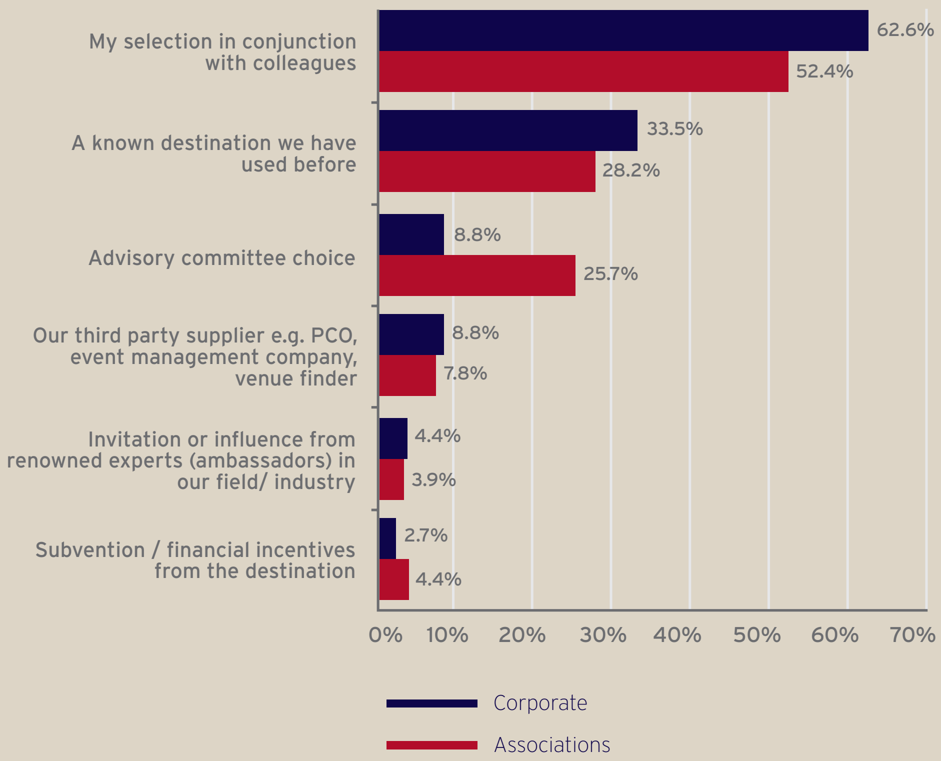
UK locations used most often by event organisers



Source: British Meetings & Events Industry Survey 2014 (**www.meetpie.com/bmeis**)

Fig. 3.4

Influences on destination selection



Source: British Meetings & Events Industry Survey 2014 (**www.meetpie.com/bmeis**)

Key factors influencing venue selection

As shown in Figure 3.5, access, location and price/value for money are the top influencing factors in venue selection while a recognised brand plays almost no part whatsoever in the choice of venue, despite leading hotel chains focusing so strongly on the marketing of brand. The capacity of conference facilities is considered more important than the quality and has overtaken availability in importance and free Wi-Fi is considered much more important.

Technologies used to help with event organisation/promotion

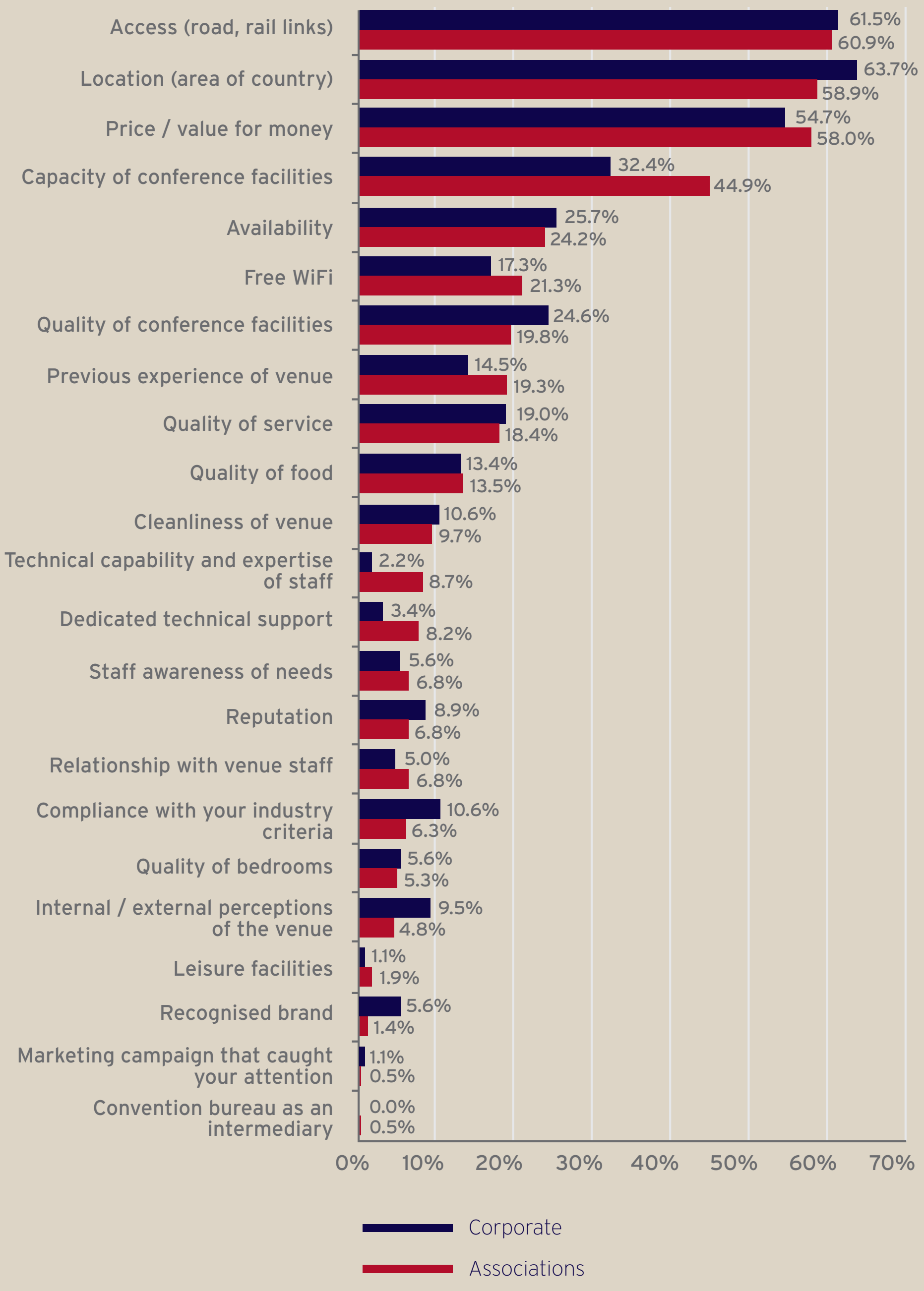
The survey results emphasise how important social media has become for event organisers to communicate with delegates. Corporates increased to 64 per cent their use of social media (from 40 per cent in the previous year) and associations increased from 56 per cent to 77 per cent. Twitter and Facebook are being more widely used by associations than corporates, probably to encourage greater attendance at their events. Online content to extend audience reach is being used by around 35 per cent of corporates and associations. New technologies such as crowd sourcing are showing very low levels of usage. Figure 3.6 gives further details.

Print and digital media consulted regularly

The printed meetings industry trade magazines are popular with both corporate and association organisers, although up to 36 per cent said they did not read any, an increased figure since 2012-3. This is most probably due to increased use of digital media as shown by the popularity of *Eventmagazine.co.uk* and *meetpie.com*. *Meetings and Incentive Travel* is the most widely read publication by corporate and association organisers followed by *Conference and Incentive Travel* in second place. Figures 3.7 and 3.8 give further details.

Fig. 3.5

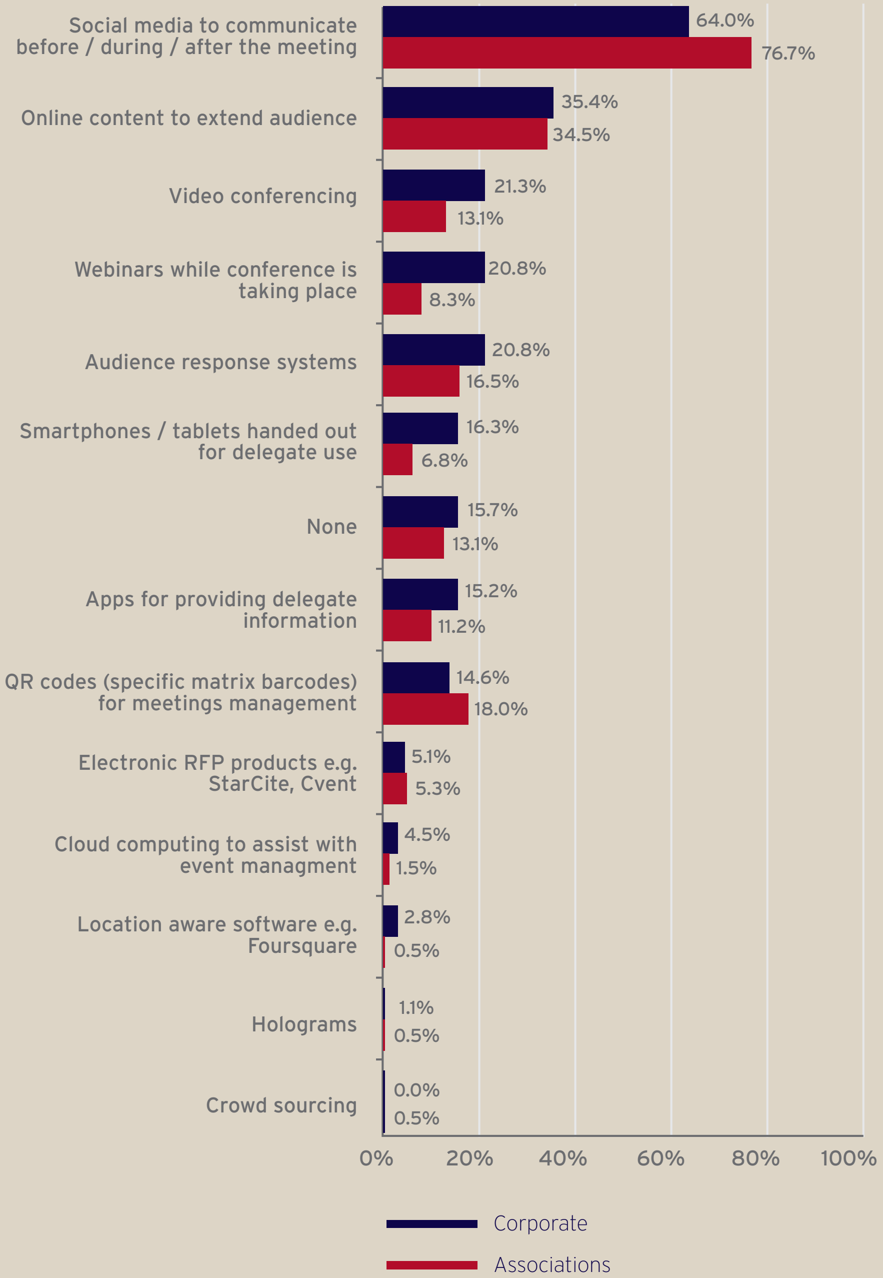
Factors influencing venue selection



Source: British Meetings & Events Industry Survey 2014 (**www.meetpie.com/bmeis**)

Fig. 3.6

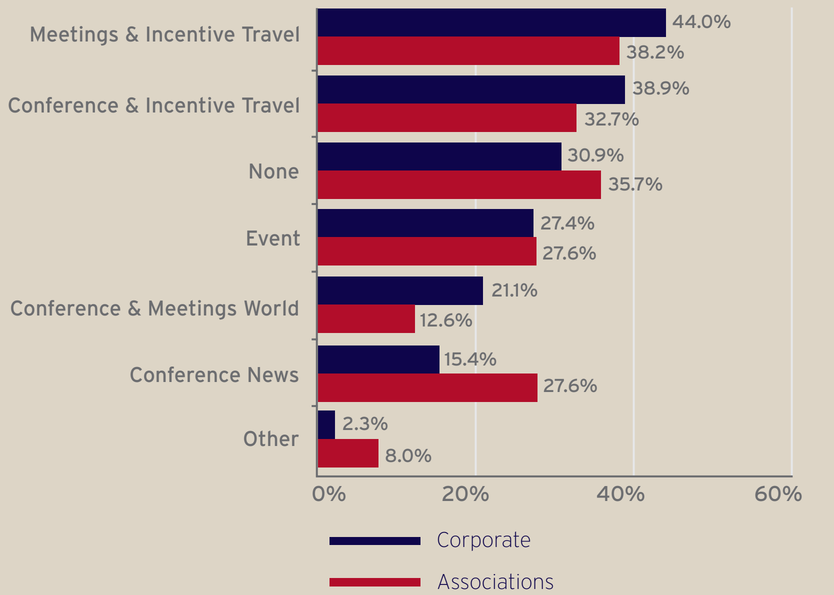
Technologies used in event organisation



Source: British Meetings & Events Industry Survey 2014 (**www.meetpie.com/bmeis**)

Fig. 3.7

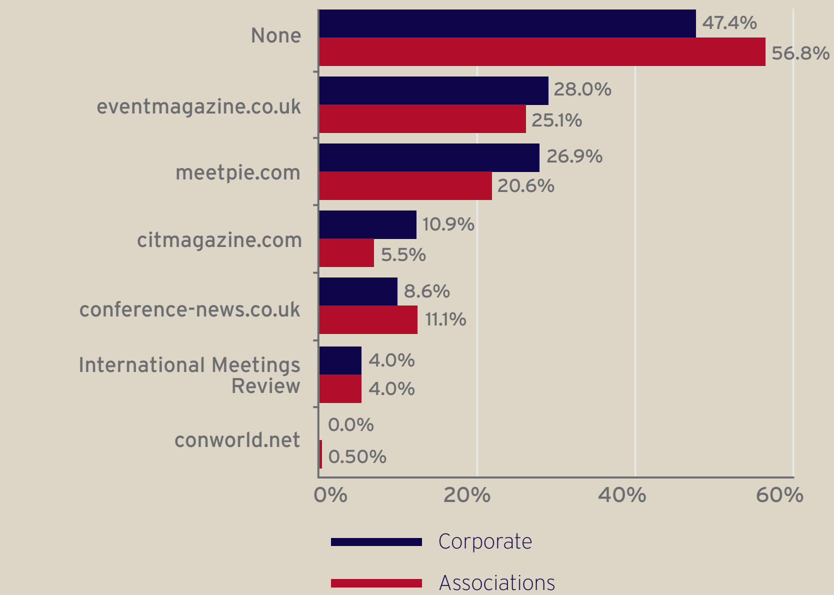
Use of print media – Publications read



Source: British Meetings & Events Industry Survey 2014 (**www.meetpie.com/bmeis**)

Fig. 3.8

Use of online media



Source: British Meetings & Events Industry Survey 2014 (**www.meetpie.com/bmeis**)

CASE STUDY

G8 Summit – Lough Erne Resort, Fermanagh, Northern Ireland

Northern Ireland remained firmly in the global spotlight when it hosted the G8 summit in June 2013. Lough Erne resort in Fermanagh was the venue for this prestigious event. The Summit brought together the heads of eight of the world's most powerful economies. The visit of so many world leaders was heralded as a vote of confidence in Northern Ireland from the world powers and was another big step forward for tourism. The accolade was resounding and, in the words of Prime Minister, David Cameron: *"Northern Ireland didn't just deliver a great G8. It delivered the most peaceful G8 ever"*. Global media broadcast such positive media exposure around the event which surely helped to change the perception of the country internationally.

www.gov.uk/government/speeches/david-camerons-speech-at-the-northern-ireland-investment-conference

New research among event venues and venue finding agencies by the Hotel Booking Agents Association (HBAA) and Conference Centres of Excellence (CCE), published in September 2013 under the title of 'Measuring up', confirms the predominance of the major city destinations as the favoured locations for many business meetings and events. After London, the most popular destination choices were Birmingham, Manchester, Edinburgh and Bristol.

The research also found growing optimism about prospects for the meetings sector, with some 80 per cent of the responding organisations claiming to be 'more optimistic' about future prospects. However, respondents did identify a number of challenges for the market, including:

- Weak economic growth, coupled with inflation and a rise in business costs
- Procurement and RFP (request for proposal) processes
- Structural issues
- Technology-based issues.

'Measuring up' suggests that the sectors which will drive future growth are financial, pharmaceutical and government. The last of these may seem surprising in the light of the severe squeeze on public sector budgets, although one venue group respondent said that they had seen '*...public sector spend shift to consultancies/private sector providing outsourced services to the public sector*'.

Another BVEP partner, Eventia-IVCA, has undertaken annual supply-side research among meeting and event venues since 1993. Published as the 'UK Events Market Trends Survey', the 2013 research reveals that some 1.3 million business events took place in the UK in 2012, on a par with the 2010 and 2011 totals. There were an estimated 85.5 million delegates accounting for 140 million business event days. The average event duration was 1.6 days, but most events (61 per cent) lasted a day or less. Other key findings from the research were:

While the average number of events per venue across all venue types was 373 (similar to the three previous years), the range was from an average of 528 events at dedicated conference and training centres to 205 events at major, purpose-built convention centres which, by their nature, tend to stage fewer but larger events. Figure 3.9 gives further details. The overall market share by venue type is illustrated in Figure 3.10, which shows that hotels accounted for 59 per cent of all events organised, followed by unusual and multi-purpose venues which held 23 per cent market share.

The growing confidence in the meetings and conferences market revealed by other research projects (see above) is reinforced by the increased proportion of residential events business (and hence greater investment by event owners) reported by venues. Figure 3.11 highlights the proportions of event business that involved an overnight stay in the destination (but not at the event venue itself), or an overnight stay at the event venue, or no overnight stay. It shows a growth from 30 per cent in 2011 to 37 per cent in 2012 in the proportion of events that had a residential element.

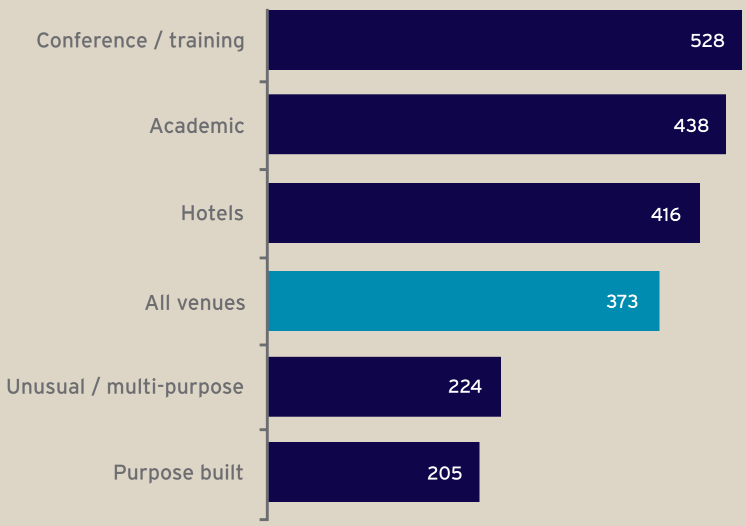
CASE STUDY

Liverpool Welcomes Thousands of Delegates

In the twelve-month period to October 2013, Liverpool experienced a bumper year for international conferences, welcoming more than 13,000 international delegates to the city. The delegates attended 22 events which generated some £24 million in economic impact for the Liverpool city region. Among the events were Eurospine, a conference and exhibition which attracted 3,500 delegates over four days and the European Society of Gynaecological Oncology with 3,300 delegates over three days, both events being staged at ACC Liverpool. Elsewhere in the city, meetings included the European Network for Translational Research in Ovarian Cancer, held at Liverpool Women's Hospital; the International Symposium on the Fundamentals of Computation Theory, staged at the University of Liverpool; and the Congress of the European Organisation for Caries Research, held at the Hilton Liverpool hotel. In 2014, Liverpool will stage the UK's International Festival for Business 2014, a global showcase of great British industry comprising hundreds of world-class events and taking place in Liverpool and the city region over 50 days in June and July. The Festival is expected to attract 250,000 visitors from across the globe, and bring £100 million of investment into the UK economy.

Fig. 3.9

Average number of events per venue (by venue type)

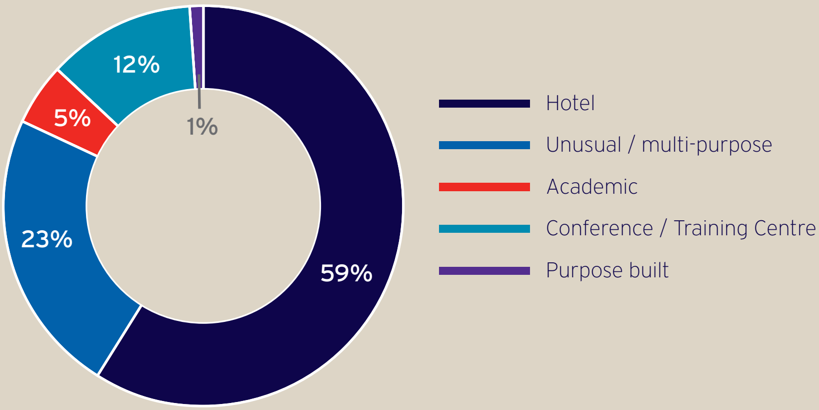


Venue figures are based on 3 yr average

Source: Eventia's 'UK Events Market Trends Survey 2013'

Fig. 3.10

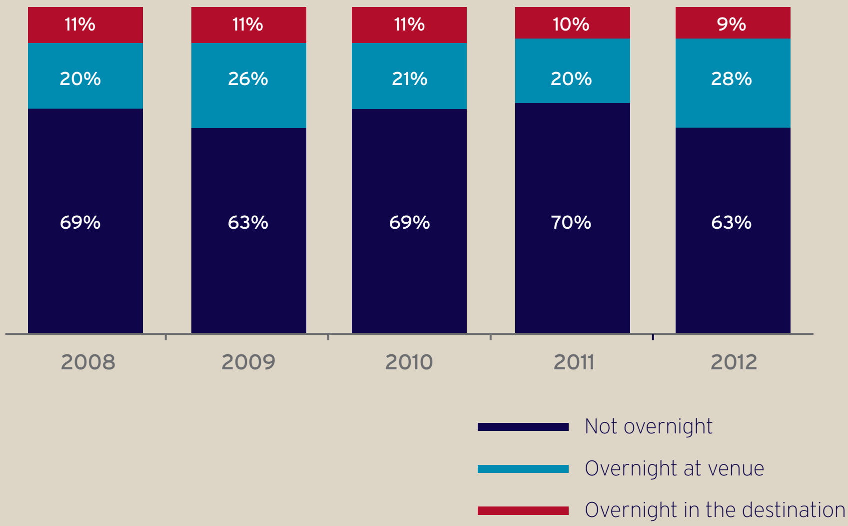
Share of events market by venue type



Source: Eventia's 'UK Events Market Trends Survey 2013'

Fig. 3.11

Levels of residential and non-residential business (% of business)



Source: Eventia's 'UK Events Market Trends Survey 2013'

International Association Meetings

The international association meetings sector has been growing strongly over the last year, as has been the case throughout the last few years of global economic uncertainty. Why is this so? Martin Sirk, CEO of the International Congress & Convention Association (ICCA), suggested three reasons at the launch of ICCA's 2013 Top City and Country Rankings (May 2013):

'Firstly, almost all international associations have a statutory duty to meet on a regular basis, and their annual or biennial main congresses have become increasingly 'mission critical' for their communities of members and stakeholders.

Secondly, economic strength in certain regions of the world is stimulating growth in regionally rotating association meetings, particularly in Asia and Latin America, but we now also see this trend starting to emerge in regions such as Africa and the Middle East.

And thirdly, association congresses are to a large extent driven by scientific, healthcare and technological advances, and we are continuing to live in an era where the accelerated expansion of discovery and innovation is at an unprecedented level, creating entirely new associations and events to share insight into, and develop business from, this new knowledge.'

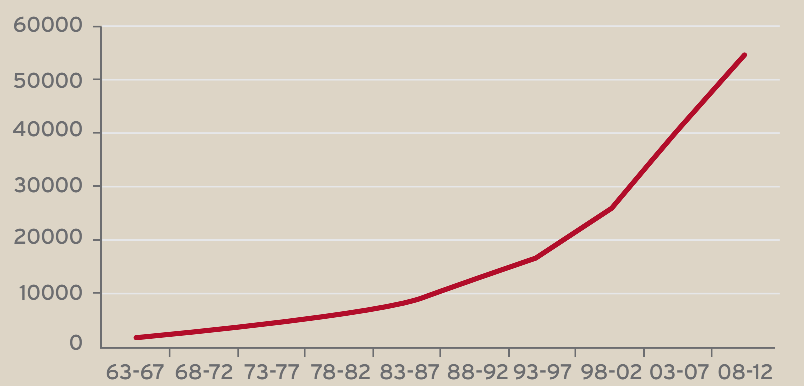
In a paper entitled 'A Modern History of International Association Meetings 1963 – 2012' (published September 2013 to celebrate 50 years of researching the sector), ICCA provides further explanation of the vital role that international association meetings and congresses play in the twenty-first century:

'International association meetings matter a great deal. Not simply because of their high spending delegates, who have been shown in numerous studies to be one of the most lucrative per-capita sectors within tourism statistics, but because of their broader impact on both their host destinations and on the wider world. Knowledge transfers; inward investment; innovative partnerships; business deals and elimination of barriers to trade – these are just some of the benefits that far outweigh direct delegate expenditure. This is why every destination which has recognised the strategic importance of becoming a leader in tomorrow's Knowledge Industry is targeting the international association meetings sector. This is why the most ambitious cities are taking steps to harness the power of intellectual capital in their universities and research institutes to recruit meetings ambassadors and advocates. And this is why we are seeing more and more central government support for infrastructure, marketing and subvention funds that can increase their country's share of this market and drive forward their economic development agendas.'

The ICCA paper clearly demonstrates the growth in international meetings over the past 50 years. Figure 3.12, representing 5-year aggregated data of the last 50 years, shows that, since 1963, the number of meetings in the ICCA Association Database has grown exponentially by approximately 10 per cent each year, which means the number of meetings doubled each 10 years. The ICCA Association Database contains 173,432 meetings taking place between 1963 and 2012. 1,795 (1 per cent) of these meetings took place in the period 1963-1967, 54,844 (31.6 per cent) in the period 2008-2012.

Fig. 3.12

Number of international meetings 1963-2012 in ICCA database (5 year aggregated data)



Source: 'A Modern History of International Association Meetings 1963 – 2012' (**www.iccaworld.com**)

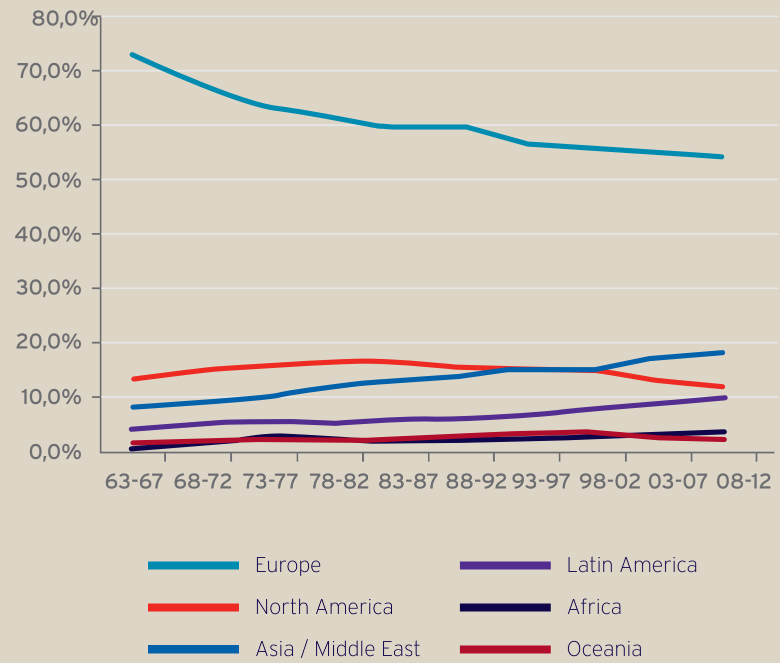
In the last 50 years, Europe consistently attracted the highest number of meetings per world region. However, Europe's market share has shrunk from 72.3 per cent in 1963-1967 to 54 per cent in 2008-2012. The Asia/Middle East region has seen a rise in relative popularity over the past decade, almost being a counter mirror to Europe – the market share of Asia/Middle East has grown from 8.2 per cent in 1963-1967 to 18.2 per cent in the last half decade. Latin America's market share has grown from 4.2 per cent to 10 per cent in the same period. Figure 3.13 illustrates the growth in global competition for international meetings over the past 50 years. The ICCA data shows the UK occupying fourth position in world rankings over the past 50-year period, behind the USA, Germany and Spain. In the 2008-2012 period, the UK hosted 2,381 international meetings, compared with a total of 169 international meetings between 1963 and 1967.

Other trends highlighted by the ICCA paper include:

- International association meetings are getting smaller. The average number of participants has dropped from 1,253 in the period 1963-1967 to 424 in the period 2008-2012. The rate at which attendance is shrinking is, however, much lower than the rate of growth in the number of meetings, so that over the last decade the average attendance has reduced by less than 20 per cent whilst the number of meetings has doubled
- Due to the numbers of meetings growing exponentially in the past half century, ICCA also notes a trend in growing the total numbers of participants, despite the average size of meetings getting smaller: the estimated total number of participants for all meetings has grown from just over 2 million in the period 1963-1967 to almost 22 million in 2008-2012
- There is a clear trend towards regional meetings. The proportion of meetings that rotate worldwide has been decreasing over the past 50 years from 76.5 per cent in the first five years to 42.5 per cent in the last five years
- The medical sciences have consistently featured as the most frequent subject matter for international meetings since the establishment of the ICCA Database, followed by science. However, technology topics are showing a rapid rise in importance. Figure 3.14 illustrates the subject matters by relative numbers of meetings
- There is a clear trend that international association meetings are of shorter duration. The average length per meeting has dropped gradually from 6.3 days in 1963-1967 to 3.8 days in 2008-2012.

Fig. 3.13

Number of international meetings per region of the world



Source: 'A Modern History of International Association Meetings 1963 – 2012' (**www.iccaworld.com**)

Other Meeting Trends

'A consensus is forming that, leading into 2014, meetings, events and business travel will be critical drivers assisting organisations in their efforts to reach strategic business objectives and effectively communicate with their employees, customers and partners worldwide', said Rob Davidson of the University of Greenwich Business School, presenting the EIBTM Trends Watch report at the EIBTM exhibition in Barcelona (November 2013). He added: ***'The mood of our industry, as reflected in the conclusions of the vast majority of surveys used in the compilation of this report, has changed to one of quiet optimism.'*** This optimism was confirmed by a second study, the IBTM Global Research, whose findings were presented at the same exhibition by The Right Solution: this found that 93 per cent of all buyer respondents predicted that their conference and events business would either increase or stay the same over the next 12 months. A similar percentage of European suppliers also forecast that their business would increase or stay the same.

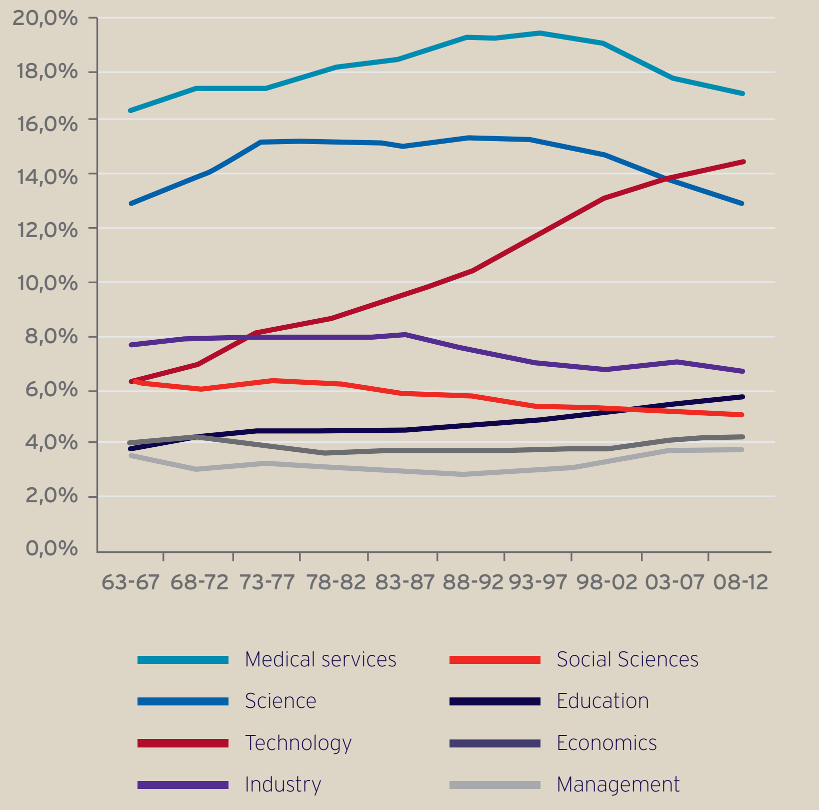
Benchmark Hospitality International, a leading US-based hospitality consultancy, announced its 'Top Ten Meeting Trends for 2013' in January 2013, providing a useful analysis of meeting trends in the USA which would seem to replicate trends in the UK and elsewhere. Benchmark Hospitality Consulting operates 39 award-winning hotels, resorts and conference centres coast-to-coast across the USA and off shore. Among the trends identified are:

1. **CMP = Completely Customised Package** – expectations are heightened for the creative and unique delivery of the industry's Complete Meeting Package. It's not that meeting planning professionals don't like packaging or see its value. They just want the CMP acronym to now mean 'customized meeting package' – customized to their unique meeting needs and budget. Gone are the days when a CMP was one size fits all
2. **Wireless EVERYTHING!** – whether it's a nod to green meetings or just convenience, note pads and pens are taking a back seat to iPads and electronic tablets as the preferred means of taking notes and documenting learning in the meeting room. Conference facilities are responding with charging stations throughout to juice up conferees' devices during breaks. Meetings are increasingly active with texting and tweeting exchanges with meeting-related content. Smart, interactive meetings are here to stay!
3. **Healthy Culinary Continues** – but ironically that doesn't mean the Danish trays aren't emptied daily. Meeting attendees, though, are demanding healthy, gluten-free, sustainable cuisine and refreshment break selections – even going so far as to request an authentic culinary experience reflecting the native cuisine of participants. Creative, imaginative, and healthy culinary offerings are increasingly requested. Healthy, protein-nourished meeting attendees are attentive conferees!
4. **What's New With Meeting Room Demand?** – Today's meeting technology brings a stronger need for secure environments in which to conduct business and learning when off site. And meeting planning professionals are demanding that meeting facilities (venues) respond accordingly. There's just too much at risk in this competitive business environment. Guess what else is in high demand – more breakout rooms – what we've been hearing for 20 years! Demand for smaller and more intimate attendee interface is increasing after a lengthy period of deferred meetings. Some things never change, including demand for more space!
5. **Teambuilding Continues Its Trend Upwards** – after years of postponed or deferred meetings, many companies are using teambuilding to inspire camaraderie and revive enthusiasm. But this is not your 1900s ropes and obstacle courses: today's teambuilding is about scavenger hunts, early morning group fitness runs, competitive bowling and culinary cook-offs. Fun, challenging and delicious!
6. **Bonus Trend** – value, value, value, including plenty to do on property for attendees, up-to-date fitness and recreation, and strong Wi-Fi signals throughout! It's all expected today. Social responsibility and sustainability are important, but not game-changers – they're part of the mix and not an end in themselves.

The renewed investment by companies in teambuilding is confirmed by further research in the USA by Destination Hotels & Resorts and reported in *'International Meetings Review' (November 2013).* In a survey of more than 180 meeting planners, 92 per cent of the respondents reported that teambuilding continues to be a strong industry trend. The research also found that meeting planners *'seek out meeting spaces, as well as public areas, that can be utilised in different ways for varied functions, from sit-down gatherings and ice breakers to brainstorming sessions'.* And, perhaps not surprisingly, meeting planners highlighted an *'increased need for a more encompassing technology service, to suit the needs of globally expanding companies and organisations'.* The full research findings can be accessed at: **www.destinationmeetings.com**

Fig. 3.14

Subject matters of international association meetings by relative number of meetings



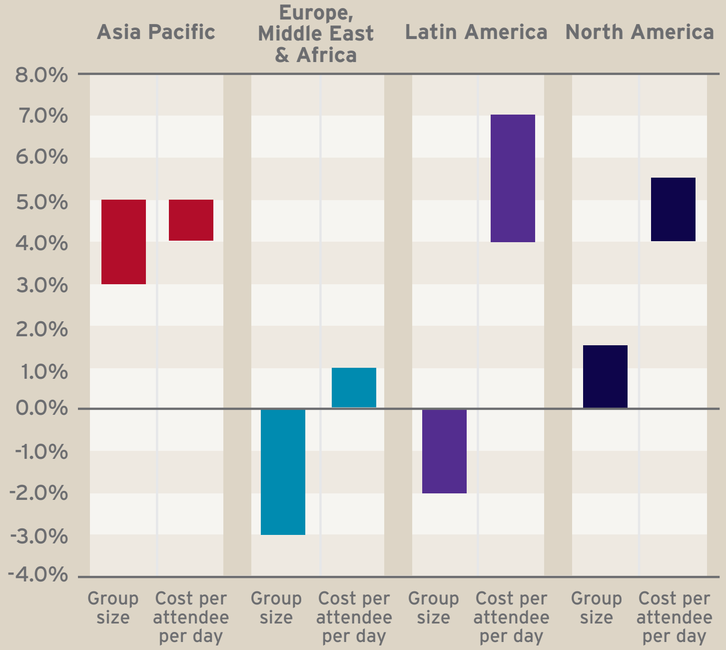
Source: 'A Modern History of International Association Meetings 1963 – 2012' (**www.iccaworld.com**)

Carlson Wagon Lit's 'Travel Price Forecast: Meetings & Events Supplement' (published September 2013) predicts that Meetings and Events (M&E) providers will be successful in raising prices around the world in 2014 at a rate that generally outpaces expected travel price inflation, as demand continues to outpace limited new supply in most locations around the world. This will result in moderate increases in daily attendee/delegate costs for meeting planners across the globe, which include meeting space, bedrooms, food and beverage, entertainment and more. The only exceptions will be Europe, the Middle East and Africa (EMEA), where attendee costs will be closer to flat given economic uncertainty that is causing some hotels and ground transportation providers to actually lower rates year-over-year. Figure 3.15 gives projections for group size growth/contraction and cost per attendee per day by world region in 2014.

In parallel with this trend, Carlson Wagon Lit suggests that meeting venues will reduce their flexibility over terms of cancellation and attrition (the amount that final delegate numbers can fluctuate from the original booking without penalty) clauses.

Fig. 3.15

Projections for group size growth / contraction and cost per attendee by world region in 2014



Source: 'Carlson Wagon Lit's 'Travel Price Forecast: Meetings & Events Supplement' (2013)

The Supplement highlights the key trends of Strategic Meetings Management, Technology and Compliance for the meetings and events sector:

Strategic Meetings Management

Strategic meetings management (SMM), which involves taking an enterprise-wide approach to the management of meetings and event processes and spending, will continue to be a focus for the most forward-thinking organisations in 2014. Currently, North America-based companies are primarily driving SMM progress, including their operations in other parts of the world, as are organisations based in the United Kingdom, given the UK's various regulatory requirements.

That said, SMM will proliferate even further in 2014, as more and more companies recognise the many benefits it provides, from maximising budgets to minimising risk. Centralised sourcing, including meeting venues, contract review, and implementation of technology are all great places to begin when embarking on an SMM programme, as these are typically manageable to put into place and deliver significant benefits.

Technology

Meetings management and event registration technologies have made significant advances in recent years, but more progress is needed to improve global consistency outside North America and to provide seamless integration with other technology platforms. Adoption of online meeting registration and booking is commonplace in North America and EMEA and will continue to grow in Latin America and Australia, but has stalled throughout the rest of Asia Pacific due to the upfront investment required by organisations.

Meeting planners will continue to be increasingly interested in virtual meetings and hybrid meetings (which combine some in-person attendance with virtual components) in 2014, either to limit group sizes or to reduce meeting duration on site. The use of mobile apps for larger meetings has gained traction as well and will continue to proliferate throughout 2014.

Compliance

CWT suggest that examples of inappropriate meetings and events spending continue to dominate media headlines around the world. The pharmaceutical industry is now subject to increased regulation of its activities, and other industries are certainly not immune from future government attention. All of this has made the subjects of compliance and ethics a systematic requirement for organisations. The good news is that there are many things companies can do to protect themselves when it comes to conducting their meetings and events appropriately. These include:

- working with reputable, long-established partners who have their own, strict internal requirements and reporting structures, which will also apply to any partner agencies used throughout the world
- clearly articulating the purpose for every meeting or event held, and aligning the money spent with the accomplishment of those goals

- implementing an SMM programme to ensure all spending is accounted for and supervised
- continuing to bring as much meeting and event spend under management as possible, which frees up to 25 per cent of the budget to invest in better delegate experience or other activities without overspending.

Ambassador Programmes

Most, if not all, major cities, are focused on developing international business as this is seen as a catalyst to driving not only the visitor economy but also the knowledge economy through specialist events that can raise awareness of the destination, just by virtue of being hosted. Such international business can also bring inward investment to a destination as there is now a focus on the legacy benefits for the destinations selected by world-leading events.

A very clear route to market is through Ambassadors, key individuals who have a strength in a specific sector, are members of the board of international associations, and may have been given funding to develop key sectors of strength within a destination through research activity. Many destinations across the UK have Ambassador Programmes, for example:

Glasgow – as at September 2013 Glasgow had 1829 active ambassadors with 18 ambassadors working on 11 conferences. Figure 3.16 shows the proportion of active Glasgow ambassadors by discipline

Edinburgh – 500+ with a robust process for contacting members each year for suitability

Manchester – has a broad programme very focused on academia, being the largest university research city in UK

Liverpool – its programme has been in place for many years and is looking to develop stronger links with the three universities in the city, in addition to working with corporates in key areas of strength

Cardiff – focus is not purely academic, includes corporates

Aberdeen – Team Aberdeen launched September 2013 is an initiative between two universities, the destination marketing organisation and the major venue

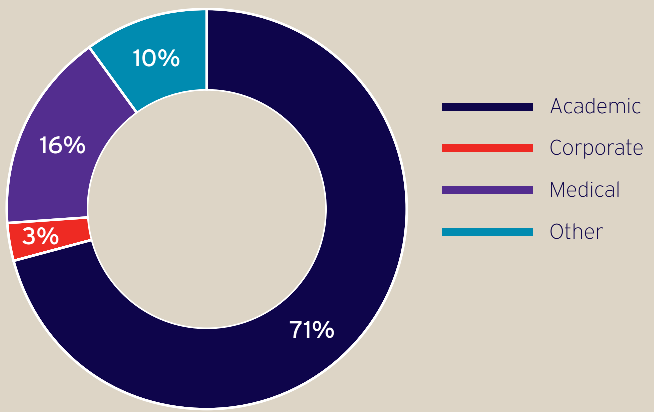
NewcastleGateshead – has a mature programme.

The GANG (Great Ambassador Network community) Group, comprising Ambassador Programme managers from across the UK and Ireland, meets regularly and discusses issues and trends across the network via LinkedIn. Current discussion topics include:

- Delegate numbers are a concern for some Ambassadors: numbers need to be robust for an event to be a success and a trend has seen numbers stay static at best, yet costs increase year on year (e.g. Food and Beverage) and so, overall, the events cost more
- Ambassadors are becoming increasingly commercial in their approach to hosting an event - this is at a time when universities are more commercial than ever before.

Fig. 3.16

The proportions of active Glasgow ambassadors by discipline



Source: Glasgow City Marketing Bureau

A profit is now 'expected' but many Ambassadors are anxious about volunteering to host an event and, therefore, taking financial risk and so there is an increased propensity to recruit a professional conference organiser (PCO) to manage budgets. Some universities are asking their staff to submit a plan to bid for conferences, including all financial aspects, before being allowed to proceed

- Many potential Ambassadors are being tasked with increased teaching and research schedules, thus taking up even more time resource at the expense of hosting events
- More Ambassadors are aware of city funding options, especially as they have experienced civic receptions in other cities around the world, and so are asking for a financial contribution from the destination. If this contribution (a form of subvention – see Chapter 2) is not available, it could be the end of the conversation in respect of hosting an event.

On the positive side, Ambassadors who have successfully hosted events are seeing long-lasting and tangible benefits for their organisation as a direct result of their enhanced reputation following the conference –part of the event's 'legacy'.

There is no website for GANG but anyone interested in learning more about the Group's activities can contact the GANG LinkedIn network via: **http://www.linkedin.com/groups?gid=2664866&trk=my_groups-b-grp-v**

Internationalisation of UK Association Events

The ICCA UK & Ireland Chapter has held some client events recently to discuss the internationalisation of UK association events. The aim is to get UK associations thinking about how their own events can become more international, in addition to 'planting a seed' about their bidding, as the UK host, for their international meeting counterpart. The events have highlighted that many international delegates attend UK association events. One, in particular, had a high percentage as the international delegates attending saw that CPD (continuing professional development) credits from the UK were of more value than those from certain other parts of the world.

The Future of Meetings

Successful businesses study their peers to remain current, develop and adapt strategies and innovate, but often the best ideas come from other sectors entirely. And the failure to evaluate trends as evidenced by experts in any number of industries can come at a dear price to those companies that want to remain at the forefront of the marketplace.

Understanding this need, Meeting Professionals International (MPI) stepped outside the meeting space for Phase 2 of its Future of Meetings research project, interviewing 26 experts in other fields to find out how trends they are noticing in their own areas will impact the event industry. All but two of the interviewees expect face-to-face meetings to remain an integral part of business for at least the next couple of decades and, in most cases, believe that online and virtual connections will actually increase the need for in-person events.

The results of the research, which was undertaken by Leeds Metropolitan University on behalf of MPI, are published as 'From the Outside In: The Future of Meetings' (authored by Jackie Mulligan and published September 2012) and the main findings are summarized in Table 3.1. The full paper together with several supplementary papers and the Phase 1 study around the Future of Meetings can be accessed at: **www.mpiweb. org/FOM**.

The paper suggests that:

'While meetings will continue to experience financial pressure and need to demonstrate tangible value, business experts concur with MPI's Phase 1 report: As new economies and industries (neuroscience, energy, biotech and nanotechnology) emerge and require more events, others (health, finance, pharma, government) will engage in fewer face-to-face meetings due to regulation and cost.

The future will require meeting professionals to understand people, their differences and their needs in terms of face-to-face communication – and data will lead the charge. Meeting professionals can also expect more virtual and hybrid meetings and will need to innovate and focus on value. Travel affordability and sustainability will pose challenges, and while experts agree that people will continue to need to meet in person and online, the value of these meetings will need to outweigh their significant costs.'

Table 3.1

The Future of Meetings

Trend	Overview	Takeaways
Designs will be specific and flexible	Forget modern spaces with sliding walls. Meetings will feature unique spaces with specific areas conducive to different objectives (one-on-one conversations, reflection, informal gatherings, presentations)	• Be clear about your offer and choices • Use specific spaces for effective design and outcomes • Focus on audience and content to ensure that your choices are appropriate and relevant • Focus on distinctiveness and character
Content will be free	The material value of content is decreasing with digitization, and industries will need to find new models to monetize it. Meetings will offer more than content delivery	• Customized pricing will mean smaller meetings, where per-head figures increase because of perceived value • Find the true value of your meetings, and your key audience • Use freemium models to reduce the risks for both clients and delegates and collect performance-based fees • Enhance your content beyond traditional delivery, use digitized formats and create more interaction • Offer more contextualization to add value • Consider other unique selling propositions (USPs) besides great speakers to differentiate yourself from content that is available online for free
Know-how will be the new knowledge	Meetings will need to support organization and individual growth, as the need for complex knowledge grows in new sectors and old sectors that face new challenges	• Consider new specialisations, such as knowledge structuring and information embedding • Try new learning environments, improved ways of engagement and new knowledge conception through co-creation, interaction and collaborative events • Investigate new sectors such as biotech and neuroscience that will require rapid knowledge exchange • View knowledge as know-how and integrate experiential learning into content design
Meeting professionals will delve into the heads, minds and brains of their clients	Technologies, social networks and neuroscience will produce more capacity for meeting professionals to gain and understand delegate feedback (pre-, during and post-event)	• Use data to shape your meetings and real-time feedback to respond to delegate preferences • Consider what information is crucial to enhance meetings and positive outcomes

Data will become more personal and less private	Overt and covert data gathering will grow, and data platforms will be increasingly integrated among themselves and in organisations. Data sharing will become commonplace, and privacy issues will create controversies. Data protection and security will threaten the sector and require careful monitoring and good critical judgement	• Invest in data security • Ask delegates and clients how much information they want to share, and assess their answers • Consider what level of security you need, and institute policies to protect your clients and delegates • Add technologies that enable integration among your platforms, so that you can build better profiles and more effective meeting management systems
You will know your customers	Businesses will see the value in personal analytics and information. Social networks will influence buying decisions, and consumers will control the buying process. The value of personal information sharing and influence will be for sale. Consumers will sell their information to companies, or simply expect more and better deals in exchange	• Use personal analytics to personalize communications, design and content; if delegates see the benefits of sharing, they will share more • Build benefits into sharing • Consider how to best use analytical scores (for instance, airlines are upgrading seats based on Klout.com scores and arranging seats based on shared interests)
Online events will feed offline experiences	On- and off-line worlds will be seamlessly integrated. For people working in purely online environments, the need to realize relationships will be stronger. Meeting professionals will be working in both worlds, not one	• Work in both on- and off-line environments • Look at industries that work in online environments, such as media companies; they represent new demand for meetings • Consider how you can use offline events to connect with wider online communities before, during and after events to enhance the perceptive value of 'being there' • See social networks as the guilds/clubs of the future, and consider what you can do to help strengthen and add value to those relationships through on-and off-line events
"It will be old age Jim. But not as we know it"	Lower fertility and mortality rates mean more people living longer. Thanks to discoveries in health, many people will be working longer, too	• Cater to many generations in one space, and be mindful of generational differences • Disregard stereotypes; older people are connected, active and experienced • Avoid ageism, and employ people of all (legal) ages in your workforce and as experts at your events
People will move to urban centres as the boundaries among countries blur	Cities increase in density, and transport systems improve as more people live in close proximity. Boundaries blur in nations and regions as companies work across borders to serve new consumer markets. Innovation and problem solving emerge under the skin of new global markets	• Look at large population centres in China for hospitality and venue design • Seize opportunities to develop facilities for ad hoc and smaller meetings • Gain understanding of new markets as big brands look to expand • Cultivate knowledge of diverse cultures to support new business development for your company and your clients

Networks will steady the ship in turbulent and transitory waters	New tribes emerge through social networks and new brand loyalties, beyond local communities and interest groups, to loyal advocates that provide stability in increasingly volatile markets and environments. Expect the unexpected	• Look ahead for change in your sectors and business models and innovate solutions • Build contingency plans; predicting behaviours will be challenging • Explore how you can gain loyal followings and advocates and steer each other through turbulent times
You will think instant, short-term and quick fix	Businesses want quick answers to problems that are likely to require time. Be cautious about accepting immediate solutions, as they may not be the best answers. Short-termism will change strategies and limit innovation. New generations and technology result in shorter attention spans and more easy-to-digest information	• Define your USP (unique selling proposition), release short sharp content or longer, focused meetings • Use visuals and graphics in presentations • Be mindful that quick fixes are not always the best option
You will need to consider cash, carbon, climate and crisis costs	The recession's lessons linger, and ROI and value propositions won't go away. Reduced carbon use will remain important, unless alternatives surface. Climate change and increasing security fears mean more frequent programme changes	• Use ROI measurement and tools that exist to demonstrate the value of your meetings • Consider scenarios with less travel in your business models • Invest in crisis management training and contingency plans to weather the storms

Source: 'From the Outside In: The Future of Meetings' (**www.mpiweb.org/FOM**)

Issues

VisitEngland is currently, through Regional Growth Fund support, funding English destinations in terms of international activity in addition to helping them with their membership of ICCA. This support is very important to give new destinations a flavour of the opportunities that exist; however, it is only a short term solution and, once funding has gone, destinations need to develop strategies that can sustain this activity if there is a true desire to develop international business for the future.

There is a general lack of large-scale integrated hotel and meeting facilities, such as they have in the USA and the Far East, putting some of the UK regions at a disadvantage when bidding for some of the large conventions. However, this applies to most of Europe and, with space at a premium and public money not forthcoming, the whole European region is at a disadvantage.

In some cities chain hotels are often reluctant to contract a block across a range of properties, thus creating the need (and expense) for the agent or end user client to manage multiple contracts.

'We would like to see greater resources for the convention bureau team at London & Partners. As London has the capacity for hosting the larger meetings, the impression can be given that, if they don't come to London, they don't come at all.' (ABPCO)

Despite the VAT recovery systems in place, not every cost can be recovered. Most other EU member states have lower concession VAT rates for tourists and conference delegates. In the UK, VAT charging remains a complex issue for event organisers and creates difficulties for them when drawing up budgets for their events.

With the exception of one or two cities, the UK is not able to offer large-scale public subvention of conferences, venues or delegates. Subvention support is more readily available in other cities and countries around the world and can be a deciding factor as the overall costs of conventions increase and cost factors become increasingly important (see the BVEP paper 'Subvention and Bid Support Practices for International Conferences and Events in Britain', available for free download from: **www.businessvisitsandeventspartnership.com**). British 'cultural' reluctance to avoid open discussion of subvention may also be an issue.

CASE STUDY

Glasgow City Marketing Bureau and Relations with Glasgow Hoteliers

Glasgow City Marketing Bureau (GCMB) has a close working relationship with the hotel community in the city and surrounding area. The hotels are represented by the Greater Glasgow Hotels Association (GGHA).

GCMB has never missed a GGHA bi-monthly meeting since the company was founded nine years ago and is included in the formal agenda with a GCMB presentation at every meeting on the key business drivers pertinent to the time. The hotels support the work of GCMB by providing detailed day-by-day forecast information, 365 days into the future and this helps shape the tactical marketing activity of the company, such as the timings of specific short break campaigns, establishing agreed dates to secure major convention and major event business. GCMB's marketing and communications activity is planned in detail using this data and its resources allocated accordingly.

GCMB runs hotel meetings on a six-weekly basis called Flying Squads, specifically for Front of House, Reservation and Sales Managers, when specific bids for conventions and events are discussed, and rate ranges and allocations agreed.

Specific industry specialist meetings with hotels also run on a bi-monthly basis that look at specific projects such as: developing a single contract for Ryder Cup Travel Services for all the city's hotels; a single Commonwealth Games Contract for the Organising Committee; developing innovative commission at source solutions for event organisers; consideration of specific customer service initiatives, such as bespoke training for hotel staff on Parkinson's disease, in preparation for the World Congress.

It would be accurate to say that the hotel community in the city is active and meeting on a weekly basis with GCMB delivering a range of activities aimed at creating better customer solutions.

The hotels take part in think tanks, sand pit projects and GCMB can and does actively call on a wide group of specialists to help solve problems and create new and innovative ways of doing business.

http://peoplemakeglasgow.com

B) Business is GREAT : Exhibitions and Trade Fairs

Value to the UK visitor economy in direct spend: £11.0 billion

An 'exhibition' was defined by the Exhibitions Liaison Council in 1995 as *'a presentation of products or services to an invited audience with the objective of inducing a sale or informing the visitor. It is a form of three dimensional advertising where, in many instances, the product can be seen, handled, assessed by demonstration, and in some cases even smelt or tasted'*.

In general terms, exhibitions can be further defined according to the market/visitors they target:

- **Trade (or business-to-business/ b2b) exhibitions** are aimed primarily at those working within a particular trade sector, and are forums where related businesses meet face-to-face in order to fulfil a multitude of objectives
- **Public/Consumer (or business-to-consumer/b2c)** exhibitions are aimed at either the wider general public or focused consumer groups. A charge is often made for admission.
- **Trade/Public exhibitions** are a combination of these two leading exhibition types; organised to attract both types of visitors, they are exhibitions where trade representatives meet each other face-to-face, but also interact with consumers.

The exhibition sector consists of three main groups:

- organisers of the exhibitions
- the venues where the exhibitions are held
- those businesses contracted by the organisers and/or exhibitors to supply services for/at the exhibition.

Within the three key sectors of the events/exhibitions industry listed above, there are a host of supplier types, ranging from audio-visual, caterers, electricians, registration to website design. There are currently 135 different supplier categories represented by the membership of the Association of Event Organisers (AEO), Association of Event Venues (AEV) and the Event Supplier and Services Association (ESSA).

Despite technology innovations and the explosion of social media, exhibitions and trade shows remain relevant and powerful as the only marketing channel to offer a flexible, face-to-face buying experience. They are a prime example of experiential marketing activity, with exhibitors able to design stands and product offerings which can appeal to all of a visitor's five senses. Yet exhibitions must harness the latest technology to ensure their continued relevance and to deliver outstanding experiences for visitors and exhibitors – for example, utilising technology and personal portable devices to complement the event offering will be a key success driver.

Exhibitions do more than just sell: they build product branding, strengthen existing customer relationships, produce high quality leads, educate, have applications for market research, generate media coverage and are often used to launch new products. Exhibitions play a vital role in the marketing mix offering a wide range of benefits.

Exhibitions provide a cost-effective competitive platform for small and medium-sized enterprises (SMEs) to promote and sell their products and services, enabling many SMEs to establish themselves in the marketplace and, through international visitor attendance at exhibitions, often providing SMEs with their first openings to export markets.

In terms of seasonality, the peak seasons for trade exhibitions are February to June and September to November, but when public exhibitions are also taken into account exhibitions become essentially a year-round activity.

The Economic Impact of Exhibitions

A 2012 report by Oxford Economics into 'The Economic Impact of the UK Exhibitions Industry' found that:

- UK exhibitions attracted over 13 million visitors in 2010 to almost 1,600 events across a range of sectors for both trade and public (consumer) audiences
- Over 265,000 exhibitors participated in events, with 20 per cent coming from outside the UK. Exhibitors spent almost £2.7 billion on goods and services to demonstrate at events in 2010
- Exhibition visitors spent over £1.4 billion on accommodation, travel and other purchases
- Event venues, organisers, exhibitors and visitors directly generated around £2.6 billion in value added (GDP – Gross Domestic Product) for the UK economy in 2010 and directly supported over 76,300 jobs
- The purchases made by the exhibitions sector and its supply chains generated £3.8 billion in additional output for UK suppliers, indirectly contributing an additional £1.8 billion to UK value added through its supply chain and supporting another 41,900 jobs in 2010

- The spending of employees in the sector and its supply chains supports further, induced economic activity, which helped to support a further £1.2 billion of value added and 30,300 UK jobs in 2010
- **So overall, the UK exhibitions sector generated £11 billion in spending and contributed £5.6 billion in value added to the UK economy in 2010, equivalent to 0.4 per cent of UK GDP. This activity supported 148,500 jobs in the UK, equivalent to total employment in the city of Milton Keynes and 0.5 per cent of total employment in the UK.**

Characteristics of Exhibitions

- Most exhibitions tend to be annual and are held at the same venue year on year. There are also a number of biennial events, while some of the large international shows are just held every four years
- The time of year an exhibition is held is critical to its success. To ensure they obtain their desired time slot, organisers usually book the venue at least one year in advance
- The timing and venue chosen for exhibitions are to a large extent dictated by the market conditions of the trade sector which they represent
- Factors that influence the choice of venue for an exhibition include (in no particular order as they vary in importance between different types of exhibitions):

  1 Rental and service costs

  2. Capacity of venue

  3. Location of venue

  4. Contractual relationship with venue

  5. Accessibility of venue

International Activity and Competitiveness

Research by the Association of Event Organisers, covering the period April 2011 – March 2012, found that UK exhibition organisers are the most active around the world. In that period, they were responsible for 1057 events outside the UK – this compares to a count of 263 overseas trade fairs for German event organisers.

On average, UK-organised overseas events attracted 200 exhibitors, equating to extrapolated exhibitor numbers of over 211,000, compared to c.93,000 for German organisers abroad.

Overseas events represent a value of c.£1.87 billion to UK organisers. On average, 56 per cent of UK organisers' turnover is attributed to events organised overseas. 93 per cent of those UK organisers operating overseas expected their overseas exhibition turnover to increase significantly (71 per cent) or slightly (21 per cent) in the next five years.

The results of UFI's 10th Global Barometer Survey (published January 2013) confirm that the international exhibition industry continues to grow with a majority of companies reporting increased turnover for 2012.

UFI's 2013 survey reveals that industry concerns remain constant with 'general economic considerations' followed by 'local competition' and 'internal management challenges' at the top. Seventy-five per cent of the organisations surveyed include the development of new business activities among their strategic objectives. Of significant interest is the expectation of 54 per cent of those surveyed to expand exhibition operations to new countries.

Full results of the 10th Global Barometer Survey can be freely downloaded at **www.ufi.org/research**

Exhibition Standards and the eGuide

The eGuide brings together guidance for achieving common standards of health, safety and operational planning, management and on-site conduct for events at all participating Association of Event Venues (AEV) member venues. The scope and development of the eGuide follows extensive consultation with operations professionals within the exhibition and event industry in order to ensure an overall approach that remains broadly acceptable to the community.

Now recognised as the industry's best practice document, the eGuide is continually reviewed by working industry professionals who represent the best advice currently available, and who themselves have to work within the guidelines in their own professional capacities. Senior representatives from EC&O Venues, ExCeL London, National Exhibition Centre, Yorkshire Event Centre, FIVE, Business Design Centre, Manchester Central, Event City, ACC Liverpool, Aberdeen Exhibition and Conference Centre, Harrogate International Centre, Ricoh Arena, the Scottish Exhibition + Conference Centre, Alexandra Palace and Glow (at Bluewater) currently sit on the **eGuide strategic committee**, meeting twice a year to steer the guidance thematically and address any complex or contentious topics. A number of additional venues also participate in this process and are gradually moving towards formal adoption of the document themselves. Additionally, the **eGuide technical committee** works all year round to maintain the detail of the document, ensure consistency and simplify rules and regulations to the greatest possible extent.

By coming together, and proactively seeking to identify where working conditions and regulations are common (or, due to unique site circumstance, different), contributing venues are, in essence, providing the answers to questions that organisers and supplier companies may have resulting in more efficient onsite activity, a smoother operation for the event organiser and, therefore, a more polished product for the client, exhibitor and visitor.

In competent hands these guidelines should be an invaluable tool, simplifying health and safety planning and management and other operational issues on the floor. Go to **www.aev.org.uk/eguide, www.aeo.org.uk/eguide** or **www.essa.uk.com/eguide** for more information.

FaceTime

FaceTime is a relatively new marketing body for the multi-billion pound live events industry, set up to help customers harness the power of live events to drive sales, enhance customer relationships and deliver customer insight. FaceTime was founded in early 2010 to provide expertise and guidance for marketers and businesses, explaining why and how live events work and how to get the very best out of the medium.

FaceTime champions best practice in the live events industry, builds insight into the medium through market-leading research and promotes its unique qualities with the goal of growing the sector. A range of bespoke collateral, including training guides, case studies (see Hammonds Furniture at Ideal Home Show case study as an example), support research and testimonials, explain how to make the very best return on investment from a live event - this can be found on FaceTime's website.

FaceTime's founding members are: Association of Event Organisers (AEO), Association of Event Venues (AEV), and Event Supplier and Services Association (ESSA). It was launched with a range of ambassadors who are supporting the body, acting as spokespeople and managing FaceTime in its formative years. Collectively, they represent all areas of the industry, from event organisers and venue owners to event suppliers and services.

Research commissioned by FaceTime has investigated how people view the different media options (face-to-face, digital, TV, radio and direct mail) in their ability to drive business through the generation, persuasion and conversion of sales leads. The research tracked the performance of each medium in its ability to deliver:

- Quality sales leads
- Cost effective sales leads
- Long term sales leads
- Conversion of sales leads
- Provision of persuasive content for sales leads.

The research also studied the unique qualities and performance of each medium and discovered that, compared to other media, face-to-face marketing is more front-of-mind for the quality of targeting and the personal touch which lead to a strong association with ROI (return on investment). Headline results of the research reveal:

- 80 per cent of respondents agree that live events deliver better ROI than other media
- 93 per cent of marketers and business directors feel that face-to-face marketing is the most effective media channel to convert prospects
- 93 per cent of marketers and business directors consider face-to-face marketing to be the most persuasive media channel
- 89 per cent of marketers and business directors and business owners view face-to-face marketing as the best quality media channel
- Across all media platforms, the best way to achieve sales leads is a combination of face-to-face marketing and digital platforms
- 89 per cent of business directors agree that exhibitions are the second most effective means of generating sales leads after a company's own website
- 87 per cent of business directors agree it is easier to communicate with people face-to-face than on the phone or by email
- 85 per cent strongly agree that meeting prospective customers in person leads to a longer term relationship
- 80 per cent agree that a person spends more money with people or companies they have met face-to-face than with people not met
- 90 per cent agree that a person is more likely to trust people/companies met face-to-face than people only communicated with via email and phone.

For more information on FaceTime, visit: **www.facetime.org.uk**

CASE STUDY

Hammonds Furniture at Ideal Home Show

The Ideal Home Show has been held for over 100 years. It is organised by Media 10 and is staged at Earls Court Exhibition Centre, London. Hammonds Furniture, established in 1926, is a family-run firm which retails through showrooms across the UK and also has a presence in another 60 retailers around the country. It spends 5 per cent of its annual marketing budget on live marketing.

Hammonds Furniture last exhibited at the Ideal Home Show in 2009 and returned in 2012 to increase brand awareness, to target consumers, promote its current retail portfolio and, by extension, hopefully increase sales. *"We were a regular exhibitor at Ideal Home Show until 2009 when a reduction in visitor quantity and suitable footfall meant the show was no longer providing sufficient return on investment for us,"* said Hammonds' media and communications manager, Kirsty Oakes. *"However, we've kept tabs on the event and, at the end of 2011, Media 10 invested a lot of time demonstrating the growth and quality of visitor profile. With that in mind, along with their investment in marketing the 2012 show, we decided it was worth exhibiting again to test the waters."*

If you did a Google search for the Ideal Home Show in the weeks leading up to the exhibition, then Hammonds might already be a familiar name. The company took sponsorship of the first link that appeared in the search engine, which promoted its name, stand number and a special offer. *"We offered visitors an extra five per cent off orders taken at the show and wanted this to be known across all our show marketing,"* said Oakes. The online presence was seen as a good way to bolster its attendance. A good relationship with the show organiser is also worth having: Hammonds had a leaflet which was distributed to their own internal mailing lists, but they were also able to include details of their show offer in the organiser's e-newsletter, which went out to 600,000 subscribers.

Oakes and the Hammonds team feel that, in the interiors market, more and more people use web-browsing as a way to research ideas and get inspiration. But, with the USP that exhibiting offers –namely allowing people to touch and handle products – Hammonds married the two together to extend its brand awareness.

"With tangible products like ours, consumers still need to see and touch them and we treat exhibitions like a temporary store. The internet has the power to drive people to visit stores and that is how we used it," Oakes explained. "We also used similar styling on both our website and our stand so visitors could easily recognise us."

As this was Hammonds' only live event presence in 2012, the stand was purpose-built and not reusable. It was 56 sqm in size and featured six rooms to demonstrate different products. There were also three interactive plasma screens for visitors to browse the Hammonds' website.

Hammonds is very proud of its personalised service, which normally begins with a visit to a potential client's home, so visitors to the show could arrange a consultation on the stand if they were interested in the products.

The majority of Hammonds' marketing spend on this exhibition presence was spent on the stand and space (80 per cent) and the rest went on staffing costs and general sundries. That should not suggest the staffing side of the process was taken lightly, however. *"We felt it important to use our own sales staff at the show. We handpicked our experienced team from across the country and split them across different days so visitors would get fresh-faced and knowledgeable service,"* Oakes added. Each member of staff was told to act like they would in their stores while on the exhibition stand, so that they felt comfortable when approaching visitors.

Oakes and the Hammonds team were very pleased with the quality of visitor that they met at the exhibition, but believe it will take a few weeks before knowing the exact outcome. *"Visitors at the show did seem to be serious shoppers looking to invest in their homes,"* said Oakes. *"I firmly believe we will be on course to meet our set targets but, as our sales process is quite lengthy, we'll have to wait before knowing what percentage of leads turned into sales."*

Hammonds took advantage of the visiting consumer journalists that took an interest in them being there too, which has resulted in some excellent opportunities for additional coverage. *"The value of extra brand awareness is priceless and I would urge all exhibitors to make sure they talk to any magazine and online journalists they happen across,"* added Oakes. >>

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"Again, it will take time to evaluate how much coverage we will get but we are confident that our marketing costs will be recouped and then some after everything is tallied up later in the year. I'm sure we'll be exhibiting again next year and our plan to leverage Hammonds' attendance at the show via the online presence really helped us to reach potential clients who did or even didn't turn up to the show. Another integrated online approach will certainly be something that will be put into the mix at future meetings about our live event attendance."

Further details of this case study, as well as other live event case studies, can be accessed on **www.facetime.org.uk**

Future Trends and Issues

Exhibition organising is a creative enterprise activity which, to survive, has to stay at the leading edge of marketing. To achieve this, the following are being considered:

- To enhance their exhibition product, an increasing number of organisers have developed conferences and specialist seminars alongside their exhibitions
- A number of technological opportunities for exhibitions are becoming available on which organisers can capitalise, using technologies like audio-conferencing, videoconferencing and webcasting
- Exhibition organisers set up websites to run alongside their events. A three-day event becomes a 12-month promotional event. This leads to increased opportunities for sponsorship and advertising through the website, and allows an enhanced visitor and exhibitor experience through providing additional information and an extension in communications
- This technology also allows for online registration, which offers a faster and more convenient form of registering for an exhibition, while allowing organisers continually to update their information and keep people constantly informed
- The new technology is used to enhance (not replace) the exhibition, as there is no substitute for the face-to-face contact, customer interaction and the ability for the customer physically to feel, see, taste, smell, test and try the product
- More organisers are looking to increase the number of public shows. Public shows are seen as being informative, as well as providing marketing and sales opportunities, brand building and entertainment, all of which add to customer value and experience
- Organisers will continue to succeed in direct proportion to their ability to identify niche markets for new exhibitions, which are targeted directly for a specific market
- The exhibition industry is continually endeavouring to increase the 'internationality' of its shows in order to enhance the opportunity for exhibitors to increase their export markets
- The exhibition segment is taking important steps forward to meet the demands for sustainability. Action is being taken to improve performance in waste management and environmental issues, adopting new techniques to improve recycling and reduce overall waste
- Successful event exhibition formats are being cloned and rolled out to regional and international markets
- Other sectors of the media mix are recognising the benefits of face-to-face marketing and are investing in the medium to communicate with their audiences.

C) Adventure is GREAT : Incentive Travel and Performance Improvement

Value to the UK visitor economy in direct spend: £1.2 billion

Definition and Background

Incentive travel is a tool used by organisations to motivate their staff and/or channel partners, with the objective of improving performance at both individual and corporate levels. This tool offers individuals or teams the chance to qualify for an exceptional travel experience, subject to their attaining pre-set goals.

Former industry journalist, Max Cuff, defined incentive travel in the following terms:

'Incentive travel is that discipline of sales and marketing and management that uses promise, fulfilment and memory of an exceptional travel-related experience to motivate participating individuals to attain exceptional levels of achievement in their places of work or education.'

While companies have routinely offered a range of employee rewards, including gift cards, merchandise and cash bonuses, travel has been found to be the most effective motivator. It is also perceived as the most valuable, with rewards ranging in value from £500 to £5,000 per head. Travel rewards are generally used by those industries producing a product or service that carries a high profit margin – such as cars, computers, pharmaceutical products and financial services. Companies in these sectors invest accrued profit from sales to fund incentive travel programmes which will, in turn, boost sales.

Travel incentives and motivational events comprise a business tool proved to change behaviour, improve profit, cash flow, employee and customer engagement and various other business objectives. When properly designed and delivered, they create a measurable and verifiable return on investment. The Site International Foundation says ('Incentives Move Business' paper, June 2013) that:

'Incentive travel programmes have been proven to increase sales, boost productivity, retain customers, hold on to top talent, increase company loyalty, promote teamwork and decrease (staff) turnover, among other results. Research into participants' views of incentive travel programmes shows that they are highly effective in impacting staff performance. Similar research with sponsors of such programmes shows that they have positive bottom line impact and achieve other goals for the corporation.'

A 2011 study into the impact of motivational events on the business environment carried out by Staples USA found that incentive programmes promote a 'competitive and reward-oriented culture' and that motivational events, when implemented in a creative and efficient way, can boost company morale and improve financial performance. The study showed that 85 per cent of employees feel valued when an incentive programme is introduced, 70 per cent said they felt more motivated, and 65 per cent more loyal to their employer.

A 2011 study by the Incentive Research Foundation ('Motivating Today's Workforce: The Future of Incentive and Recognition Program Design') reported that today's highly educated workforce responds to more tailored, non-cash incentive plans that celebrate creativity and promote best practice. It suggested that personalised recognition based on personal performance, innovation and mastery of skill are key to capturing the intellectual and emotional commitment of employees. The study underlined that, while salary remains the primary pact between employer and employee, the personalisation of rewards is crucial to individual effort and motivation.

And yet, at a time of frozen salaries, slashed bonuses and negative media coverage, many might assume that staff motivation was no longer in fashion. In fact, the reverse is true. Aileen Reuter, Practice Lead, Creative Communications for Grass Roots, comments:

'Companies that have undergone restructuring are inevitably left with staff unsure about their futures. As a result, they need to look at how to restore morale and get the best from a slimmed-down workforce. This firmly puts motivation programmes back on the corporate agenda and overseas incentives are proven to work extremely well, being seen to signal an escape from daily life and create a real sense of anticipation – which leads to all-important discretional effort.

Whilst they may seem incongruous against a background of corporate cost-cutting, a well thought through travel incentive is often self-funding and not staged for frivolous purposes. When it comes to 'wow' factor, this will always be on the agenda for celebratory, recognition and experiential events. These types of events need to be memorable and, in particular, recognition events need to be aspirational, which means experiences that are out of the ordinary – ones that money can't buy.'

John Fisher of FMI Group, incentive travel specialist and writer, describes the different levels or layers of incentive programmes. He says:

'Most incentive schemes involve a wide cross-section of the target audience and are multi-layered in terms of reward. So it is not unusual to have a group incentive travel event at the top of the incentive pyramid aimed at the high fliers with weekend domestic events as secondary prizes, supported by retail vouchers or electronic gift cards for middle-ranking achievers who have reached the first rung of exceptional achievement. The idea is that the rewards budget should be targeted at different but achieving sections of the audience to encourage more than just the very best to 'win something'. Incentive travel sits at the top because it is the most attractive reward. But the downside is that it costs relatively more per head than other rewards. So with a generally fixed budget there are going to be less travel winners than there are gift card winners, for example.'

Economic Benefits

The fact that hotels do not differentiate between conference and incentive travel group bookings makes it difficult to track occupancy levels. However, we do know that incentive groups are concentrated within the four and five star hotel properties and that they account for 5-10 per cent of bedroom revenue in these properties.

London is the most popular incoming UK incentive destination, followed by Edinburgh, Scottish golf resorts and Stratford-upon-Avon. Many long-haul-originating incentives are based around two centres: London plus Edinburgh, for example. There is a growing trend for UK organisations to use domestic venues such as country houses rather than going abroad, both to save budget and to be seen to be prudent, particularly within the financial services and pharmaceutical sectors. So it is no longer always true that the incentive market necessarily includes an element of overseas travel.

In addition to accommodation, incentive participants enjoy top quality entertainment programmes as part of their reward. These include excursions, theatre trips and lavish dining experiences, often held in unique venues. The wider tourism infrastructure benefits considerably from these business customers.

The USA remains the largest national buyer of incentive travel, constituting 50 per cent of the overseas market. Other key markets are Germany, France, Italy, Spain and Russia; also long-haul English-speaking markets, such as Australia, India and the Far East. In the case of the Far East, the number of participants can be quite large but the programme is often less structured than those held elsewhere. In terms of national characteristics, participants tend to favour destinations which are more easily served by their own national airline: and so French participants will visit the French Caribbean because it is better served by Air France, British participants visit Barbados which is better served from the UK by British Airways.

The domestic incentive market is difficult to measure accurately, since the reward media are frequently purchased off-the-shelf, in the form of hotel vouchers, weekend breaks or luxury/adventure experiences (hot air balloon rides, Formula One race days, etc).

Nevertheless, a thriving industry exists to service the needs of corporate incentive buyers and includes such specialists as gift card companies, incentive companies offering pre-paid debit reward cards, caterers, creative theming agencies and corporate entertainment companies.

Characteristics of Incentive Travel Programmes

The fulfilment of an incentive programme is the travel experience itself, but this is preceded by a motivational campaign, beginning with a launch event. Planning cycles vary depending on the industry sector of the provider. Approximately a third of incentive campaigns start six months before the trip takes place; the remaining two-thirds start between six and 18 months ahead.

Measurable objectives are set by the incentive providers – usually the company's sales or marketing director, often working in tandem with a specialist incentive travel or performance improvement agency. A continuous promotional campaign encourages participants to maintain high levels of performance throughout the period and the highest achievers will qualify to participate in the reward.

Historically, incentive travel has been experienced by groups of qualifiers. In recent years, however, there has been an emerging trend for winners to select the time and sometimes even the location of their reward, thus turning the reward into a private holiday with partner and/or family. This trend currently applies to about five per cent of incentives, but there is no indication that this figure is increasing.

Employers generally prefer to structure the rewards as group experiences, so that the perception of being part of an elite 'achievers' club' can be maintained. It also allows for more 'face-time' between sponsors and high achievers which can be very motivational for future performance.

One of the more recent trends among incentive travel programmes is the incorporation of a socially worthwhile activity, in line with the organisation's CSR (corporate social responsibility) policy, where award winners can give something back to the communities they visit. Social legacy activities can considerably enhance the image of individual companies and the business events industry as a whole, by demonstrating their social awareness and desire to make a difference. This is particularly important at a time like the present, when the economic climate means that media and company shareholders are alert to corporate events that appear too lavishly funded.

CASE STUDY

Incentive Reward Programmes for UK Recruitment Agency

Introduction and Background

Banks Sadler deliver global meeting management services, operating from offices in London, York, Dusseldorf, Paris and New York. This case study describes their successful pitch to run an incentive reward programme for an international client.

As the world's leading provider of HR solutions, the client has more than 33,000 employees and a global network of over 5,500 branches. They are the UK's largest recruiter – with over 350 offices and a client base of more than 33,000 organisations – and offer a broad range of services, including temporary and permanent placement, career transition, talent development, outsourcing and consulting.

The client runs a quarterly incentive scheme to reward their top earners and key achievers, broken down into different incentives for Quarterly and Annual Winners. Quarterly Winners are treated to an all-expenses paid, three course lunch with a drinks reception at a high-end restaurant. Previous venues have included Rhodes 24, Babylon at the Roof Gardens and The Ivy.

A larger group of Annual Winners are awarded with an incentive trip, which has previously taken place in destinations such as Miami, Rio, Barbados and Marrakesh.

Banks Sadler pitched against 4 other agencies for the incentive scheme business, and were informed that they had won, due to being "leaps and bounds" above the other companies in contention. The relationship between the client and Banks Sadler has flourished and Nicola, Banks Sadler's Account Manager, is thoroughly enjoying working with this client.

Programme Objectives / Client Brief

For the Quarterly Winners' Incentive Lunch, Banks Sadler was briefed to organise 3 lunches (for Q1, Q2 and Q3) for 65 winners at an upmarket, high-end restaurant with a drinks reception.

The brief for the Annual Winners' Incentive Trip was to provide a memorable overseas visit for 30 Gold and 100 Silver Winners; lasting between 4 - 5 days (3 – 4 nights) for Gold and between 3 – 4 days for Silver. Suggested destinations needed to be a maximum of 12 hours' flight time from the UK, with the option of flights from regional UK airports.

In terms of the programme of activities, these needed to appeal to a wide range of audiences and have cultural links with the destination. The client was also keen to include a training session and one Corporate Social Responsibility (CSR) activity, and to deliver an interesting and culturally-involving final dinner event.

Programme Content

For the Quarterly Winners, Banks Sadler organised lunches at The Ivy (Q1), Aqua Nueva (Q2) and Circus (Q3) restaurants in London. Winners also received branded luxury chocolates which were delivered to their offices, and a branded moleskin notebook at the lunches.

The Annual Winners' incentive trip is due to take place in March 2014. The chosen destination is Reykjavik (Iceland), which meets all of the requirements specified in the client brief. Guests will be staying at the Hilton Reykjavik, with a programme that includes a Helicopter Tour and Spa Treatments for Gold Winners; along with a glacier expedition, whale watching, the Blue Lagoon and an Eco Village visit (where attendees will be working on different tasks to improve the village) for all. Evening entertainment will be available on all nights of the incentive, which culminates in a Gala Dinner which will incorporate the fire and ice theme. To help design and implement the trip, Banks Sadler is using a trusted local DMC who they have worked with many times before.

Post-Event Feedback

Positive feedback has been received for all of the lunch incentives that took place in 2013, with the overall comment that Banks Sadler went above and beyond on all counts. In recognition of this, the client CEO commented:

"...the support from your staff was exceptional. They were attentive and organised. The venue and the food were, of course, excellent, but it was the small things that made a difference - very good service indeed! Please pass on my thanks to them for a very well- orchestrated and run event."

Feedback for the incentive trip is expected after the event.

www.banks-sadler.com

Destination Selection

Selection of incentive destinations is based on a number of factors, including:

- Value for money
- Climate
- Ease of (travel) access
- Business links
- Sophisticated tourism infrastructure
- The 'wow' factor

John Fisher of FMI Group describes destination choice for incentive schemes in the following terms:

'Choice of destination for incentive travel is a factor of the available budget per head, the accessibility by air from the sponsor's country, the perceived image of the destination and to some extent the destination's ability to promote itself effectively. There are many wonderful places in the world but, if there is no air access on scheduled flights from the departing country, it is unlikely the budget will be able to stretch to a private air charter as the only alternative means of transport. Equally, for the destination to work as a promotional incentive, potential participants need to have some prior knowledge of the destination and want to go there. Destinations such as Monte Carlo and Rio de Janeiro sell themselves but how about Sardinia or Quito? That said, 'new' destinations are always being introduced to the market and, thanks to some investment in promotion and industry exhibition appearances, new places can capture a significant part of the market if they promote heavily enough. Scottsdale, Arizona springs to mind as a good example of somewhere ordinary folk would not recognise but, due to heavy business to business promotion, it is certainly one of the choices whenever a buyer asks about options in the USA for an upmarket incentive travel event. Dubai is a similar example of a destination buying its way into the market. It has been hugely successful from a standing start but there has been significant Government money and infrastructure planning to make it viable.'

A 2012 study (the 'National Motivational Research Agent Study') into reward and recognition practices among more than 5,000 financial and insurance sales representatives in the USA and Canada, found that:

- Destination is perceived as a highly influential motivator in reward and recognition
- Four-star inclusive properties are more appealing than five-star (not inclusive) properties
- Producers prefer more relaxing experiences and activities, and so limit scheduled daytime activities
- Respondents prefer shorter on-site business meetings (a maximum of two hours)
- Younger agents prefer summer travel experiences (July or August).

The study concluded that the above elements not only affect the appeal of the travel award and how hard an agent will work to earn it, but also affect the company's budget and bottom line. Out of all respondents, 76 per cent indicated that they would make some effort to earn that travel experience, with 70 per cent noting a high level of effort.

Future Trends and Issues

Incentive travel is a well-established sector of business events and for international markets the UK is one of the most popular destinations. However, visitor numbers are greatly influenced year-on-year by the strength of the pound in relation to other currencies and by issues such as perceptions of security and the ease/cost of visa processing.

Guidelines published by the Financial Services Authority (February 2013) are likely to have a major negative impact on outbound incentive travel programmes for financial sector organisations. It seems likely that even non-cash incentives based on specific product sales are no longer allowed. The implications for the non-cash incentives industry are wide-ranging: John Fisher suggests that ***'we can probably say that the days of lavish overseas incentives and conventions for the financial services industry are gone. We have a seen a similar tail-off in the pharmaceutical sector.'***

Another recent 'own-goal' for UK motivational travel has been the introduction of the UK Bribery Act. UK hospitality has seen a downturn of some 30 per cent and falling since the Act became law. Although many commentators and industry experts have written numerous articles and held seminars to show that the Bribery Act is not intended to outlaw genuine hospitality - and indeed the guidance notes to the Act actively encourage more hospitality as a means of fostering business growth - in-house lawyers have largely decided that supplier invitations should now be treated with caution or even banned. The result is that incentive travel is now viewed by many plcs as being 'unacceptable', citing the UK Bribery Act as the justification. There is an element of using the Act as an excuse to cut back on discretional marketing cost in these difficult trading times but few corporates will admit to this in open fora.

There is an urgent need for a comprehensive study into the value of the UK incentive and performance improvement sector. The last such study was commissioned by the UK national tourist boards and published in 1996.

Incentive travel programmes increasingly have an educational element for the participants. This can involve visits to factories and businesses in the same industry sector as that of the award winners, team-building programmes, and a conference-type session with an award presentation ceremony and announcements of corporate plans, designed to encourage the incentive winners to reach future performance targets. A mix of business and motivational content can have an impact on the tax an incentive programme attracts – and so, including a business element to the programme can be cost effective. That said, the tax-saving element is rarely the driving force for including 'education'. This is more to do with justifying the overall expenditure to stakeholders and investors.

It is debatable whether incentive travel as a market segment will ever hit the dizzy heights of the 1990s when groups of 300-400 participants were not unusual, especially within the financial services sector. In these more austere and regulated times, the average group size is nearer 40-50 participants. It seems likely that the same, or similar, numbers of events will continue outbound from the UK but they will be marketed more as 'conferences' than pure incentives.

But there is an enduring appeal to hosted, group travel as an incentive which suggests that this particular service will continue within certain niche markets and be serviced by specialist operators for some years to come. Growth is likely to come from unregulated markets such as electronics and IT rather than the former major sectors of pharmaceutical, financial services and automotive.

(See also the references to incentive travel in the next section of this Report on 'Corporate Events and Corporate Hospitality')

D) Memories are GREAT : Corporate Hospitality and Corporate Events

Value to the UK visitor economy in direct spend: £1.2 billion

Definition and Background

The corporate events segment covers incentive travel, client entertainment, staff entertainment, meetings and conferences and so has a clear overlap with some of the other segments described separately in this Report. However, this section of the Report is written specifically from the perspective of companies providing specialist services to the corporate events segment, thus complementing information to be found elsewhere.

There is no regular research undertaken to assess the overall volume and value of the corporate events segment to the UK, although an estimate of £973 million made by MBD Ltd in August 2009 is felt to be reasonable by many working in the segment. This total represented a contraction of 6 per cent over the previous year. MBD forecast that the market would, however, grow steadily, in the next few years to reach a value of £1.205 billion by 2014, a cumulative increase of 24 per cent compared with 2009. A Global Industry Analysts (GLA) report, referenced in the October 2011 issue of 'Conference & Incentive Travel' (C&IT) magazine, foresees that the industry will grow to £1.47 billion in the UK by 2015. The same C&IT article also cited a Barclays Corporate 'Business in 2021' survey which revealed that 73 per cent of businesses surveyed believe that hospitality in the UK will increase in the coming decade.

Corporate hospitality is a crucial part of the marketing mix, as it demonstrates a company's willingness to get to know people as people. Through face-to-face time in an enjoyable and relaxed environment, companies can build a long-lasting rapport with their business associates, and develop a greater understanding of their priorities and needs. It is also a cost-effective way of associating a company brand with an iconic event.

Overall Trends

Some in the industry believe that overseas incentive rewards are in long-term decline as a motivational tool, although others dispute this. A combination of factors is contributing to this downward trend. These include the increased long-haul holiday traffic removing the cachet of winning trips to far-off places, and the gradual change in motivational practices within certain businesses. Sustainability concerns, security, taxation issues and pressures of time may also be playing a part.

The traditional method of rewarding a few top performers to encourage others to aspire to such heights is giving way to a broader strategy of motivating sales teams through inspirational events that unite, entertain and reward whole teams. The increased financial burdens created by tax and national insurance implications, added to the growing value placed by executives on quality time at home, are also contributing to a trend towards different types of motivational programmes which reach wider audiences.

During the economic recession, there was a noticeable trend towards non-public events and entertaining 'under the radar' and away from the glare of a public event. This has been accelerated by recent media exposés of company directors on corporate days out but, on the flipside of the coin, by companies recognising the need to have client interface and to protect their own brand reputation and image.

There is no clear consensus on whether companies are making greater use of agencies to source their hospitality requirements – although outsourcing is commonplace where the head count is reduced in internal event management departments. Even so, agencies are not making the large volume financial commitments they made previously. Instead, they are accepting lower levels of commission (than they would receive if they made a large financial commitment) and are waiting until they have the sale before placing it. In short, agencies are no longer speculating.

The current decade offers a number of excellent hospitality opportunities around major sporting events. The 2012 Olympic and Paralympic Games are being followed by the Commonwealth Games, the Rugby World Cup, the Rugby League World Cup and the World Athletics Championships. Many blue-chip companies opt to entertain the best customers at the biggest sporting and cultural events. Alex Herbert, events manager for Spirit Marketing Group, is quoted in 'Conference & Incentive Travel' magazine (October 2011):

'The type of hospitality and entertainment that large brands and agencies are offering their clients has gone up through the gears. Competition is huge – everyone wants to impress and be memorable. This has led to the need for high-quality or unique entertainment that best complements what they can offer as a business.'

The demand is now for an experience, not just an event. Sports hospitality works because it provides an opportunity to share an experience, perhaps even a moment in history. Chad Lyon-Cachet, chief executive of Sportsworld, says (quoted in The Times special supplement on 'Corporate Hospitality & Events' – March 2011):

'It is not just about the game but about the people you met and the great time you had.'

Measuring return on investment is increasingly important and represents a real competitive edge if hospitality providers can quantify business generated from expenditure. Companies have always expected value for money but, with tighter controls on spending, hospitality and events are increasingly tailored to individual needs in special bespoke solutions. The personal touch is replacing off-the-shelf packages.

Combining corporate hospitality and events with the latest technology and social media is increasing the impact of bespoke marketing campaigns. A very modern marketing mix is harnessing online technologies to facilitate two-way communications with customers and staff alike. Live events can be transformed to engage participants.

Client Entertainment

The relative growth in participation-based events, including motor racing and clay pigeon shooting, that dominated the 1990s has slowed as the novelty of such activities has worn off and companies have retreated to the safer and more reliable hospitality events. Companies are also concentrating on the key events in the social calendar (e.g. Wimbledon, Royal Ascot, Chelsea Flower Show) and the smaller peripheral events have all seen further decline in their business.

Tailoring an event to appeal to the senior management that brands would like to attract is now evident. This can be seen in a sustained demand for more experiential events, often at a premium, such as the players' lounge at Twickenham, with four or five players coming straight off the pitch (after a rugby international match) for a question and answer session.

Hospitality buyers now focus on entertaining fewer and more senior clients with a trend towards greater justification and control of spend on hospitality, demanding more innovative solutions and demonstrable value for money.

This increased cost control is often as a result of the procurement policies of large organisations, attempting to centralise their buying practices in order to monitor spend and improve purchasing. Many organisations have created approved supplier lists (of widely varying lengths!) as part of this process, and seek to ensure financial probity in the purchasing process.

A 2013 survey of senior company representatives by hospitality provider Keith Prowse shows that two-thirds of those surveyed use corporate hospitality to encourage engagement between clients or staff which leads to better relationships. The report underlines hospitality as a bona fide relationship-building tool which is used:

- To encourage engagement between clients and/or staff which leads to better business relationships (by 66 per cent of respondents)
- To provide an inspirational setting to aid interactivity (used by 49 per cent)
- 89 per cent use the traditional meeting format to obtain direct business decisions.

Other key reasons identified by Keith Prowse for companies choosing sporting and cultural events to entertain staff and clients were:

- 76 per cent agreed that being taken to a hospitality event underlines the value of the guests' organisation
- 96 per cent agreed that face-to-face interaction with co-workers is necessary for effective teamwork
- 97 per cent agreed that 'downtime' with clients builds stronger relationships.

The results also reveal the growing fluidity of meetings and that they regularly run over the average 60-minute time frame, which perhaps explains why guests opt to entertain at day-long sporting and cultural events.

A 2013 corporate hospitality survey undertaken by 'Meetings & Incentive Travel' (M&IT) magazine (January/February 2013) found that 62 per cent of the corporate event organisers surveyed 'strongly agreed' or 'agreed' that corporate hospitality events provide good return on investment. The main benefits were described as 'face-to-face contact' and 'cementing existing relationships'. In the M&IT article, Guy Stevenson, Imagination's client services director, is quoted:

'Someone much wiser than myself once pointed out that it is people who work together rather than companies. As long as this is the case, there will be a role for corporate hospitality to allow business relationships to grow.'

The survey confirmed, however, that the introduction of the 'UK Bribery Act' in 2011 had created a 'grey area' for certain elements of hospitality. In part it was felt that organisations were misinterpreting the new legislation, while the regulations themselves suffered from extremely vague definitions.

In terms of preferred types of events for offering hospitality, the M&IT survey found that the most popular options were evening entertainment at a show or dinner, followed by a music concert, and then rugby, car racing and football. As for 'new' options, 51 per cent of those surveyed added that the chance to bring partners would be attractive when accepting hospitality, while the idea of weekend events and the possibilities of volunteering days were also popular.

Staff Entertainment

The genuine value of a happy and loyal workforce has not been lost on most of the UK's leading businesses. It is interesting to note that, as the UK economy emerges from recession and momentum builds for sustained economic growth, companies are again investing in events and entertainment as vehicles for increased loyalty, reward and engagement. Some bones were put on this trend by research into the Christmas party market by event management company, Evolve Events (published October 2013). This shows:

- Christmas party bookings up by 12 per cent
- Smaller parties of up to 150 guests are on the rise, with a 17 per cent increase in more intimate company dinners (although larger bookings for 600-plus guests are still uncommon)
- It is not only the month of December that has seen a rise in bookings: organisations are now increasingly looking to hold their Christmas parties in January, with the level of bookings taken for January 2014 showing a growth of 8 per cent compared to January 2013
- Even though companies are increasing their Christmas party spend, they are still wary of being seen to book for larger parties.

Outside of the Christmas market, summer fun days involving the whole family remain popular, but the overall trend is towards rolling entertainment into conferences and internal communication events where greater value can be achieved.

Research consistently proves that the main motivator for work is not money, so the value of maintaining a happy workforce should never be overlooked!

Summary

The UK is undoubtedly leading the world in many areas of the live events industry. It can be proud of its home-grown talents – talents that are frequently exported to deliver events across Europe and further afield.

Trends and issues for the Corporate Events and Corporate Hospitality Sector

In general, the corporate events and corporate hospitality market remains robust despite some very negative media coverage of corporate 'excess' at a time of economic difficulty. The segment remains resilient and companies, even those in the financial services sector, still depend on corporate hospitality as a means of developing loyalty and increasing market share with their clients and as a core activity for rewarding and motivating their own staff.

Away from the sporting arena, those organisers offering activity days, team building events, treasure hunts and corporate fun days and the like have had to respond to the impact of huge events such as the 2012 Olympics. There is no doubt that the attraction of this sort of high profile event tends to divert budgets away from those agencies offering participatory events and activities.

Corporate buyers are increasingly keen to book participative packages, rather than those in which guests merely watch from the sidelines. There is no doubt that events are now seen as a powerful communication medium that can change perceptions, attitudes and behaviours and create genuine brand experiences. Interactive packages, where clients can be coached in activities such as golf or driving by a professional or sporting hero, are popular. In some cases this can extend to a client being invited to bring his/her partner or even the whole family.

Increasingly, there is a need to match the experience with the audience and organisers who do not seek to discover participant preferences at the time they are planning a corporate event or hospitality activity, are adopting a hit or miss approach that has a significant risk of failure. So forward-thinking hosts are looking to devise a range of hospitality opportunities that match differing guest profiles.

In common with the rest of the B2B sector, corporate events and corporate hospitality are increasingly being required to prove their worth with client companies under pressure to demonstrate return on investment. The challenge now facing the sector is to find appropriate methods to measure and evaluate the effectiveness of events being organised.

It is leading companies to invest in knowledge management of their clients and to develop sophisticated CRM data to understand the hobbies, interests and lifestyle of their customers, their partners and even their children, to enable them specifically to target invitations to achieve maximum impact, appreciation and, ultimately, loyalty.

At the same time, clients are looking for innovation and creativity with an emphasis on participation and, where events are of a more passive nature, they are looking for exclusivity and style. Royal Ascot, for example, has witnessed a sharp increase in companies booking out an entire restaurant to ensure exclusivity.

Recommendations

Appropriate support for the segment includes the reinstatement of corporate hospitality allowances on activities that seek to bring business and events to Britain to include Inward Missions, bidding for major events, and entertaining to grow exports.

E) Culture is GREAT : Outdoor Events

Value to the UK visitor economy in direct spend: £1.1 billion

Definition and Background

The outdoor events industry is a dynamic segment of the business visits and events sector. Outdoor events have taken place in the UK since time immemorial, despite our unpredictable weather, but the first real information on such events, jousting tournaments and village fairs, for example, developed from the times of the Crusades in the 11th and 12th centuries. Nowadays, outdoor events take place in every corner of the UK: city centres, rural areas, mountain and coastal regions and even in very remote locations.

Although not all falling within the strict parameters of business events, high profile outdoor events cover a breadth of activity from major festivals (such as Edinburgh International Festival), music events (e.g. Glastonbury), agricultural shows, sporting and charity events through to small village and craft events. From the beginning, outdoor events have drawn large gatherings whether local, national or international; and this is an increasing trend following the Olympics in 2012. The visitor from abroad is attracted to a myriad of events in the UK, many of them being steeped in tradition and history.

The world of outdoor events has developed into a highly professional and quality standard industry made up of local authorities, show organisers, event management companies, promoters, venue owners, together with suppliers of equipment and services, and consultants.

Value and Scope of Outdoor Events

A few years ago the National Outdoor Events Association (NOEA) carried out a survey and conservatively estimated that the outdoor events industry had an annual turnover of up to £l billion. However, the industry has changed and one event alone, T in the Park in 2011, was worth more than £40 million to Scotland - this is compared to £18 million for the same event in 2005. So the total annual figure will have risen considerably and NOEA are planning to conduct more research on this in the future.

There are many hundreds of different events including exhibitions under marquees, classic car shows, agricultural and flower shows, craft and gift fairs, dog and horse shows, antique fairs, farmers' markets, countryside and county shows, horticultural shows, highland games, steam rallies, carnivals, gardening shows, air shows, pop concerts and music festivals, firework displays, sporting events, cultural and arts festivals, Christmas fayres, water festivals, balloon festivals, military events, village town and city events, charity functions and every kind of festival catering for specialist interests and, of course, national and international events and extravaganza for people of all ages and cultures taking place all year round.

Many of these events last from 1-3 days and attract tens of thousands of visitors, which can involve considerable travel and staying overnight in places ranging from campsites to upmarket hotels. The events have substantial benefits for local economies and can dramatically affect the environment of a region, bringing more spend from visitors and tourists and hence more employment and wealth to local communities.

Research on Glastonbury in 2007 saw festival visitors spending some £26 million off site, giving a major boost to the local economy. Ed Vaizey, MP and Minister for Tourism, writes in a Foreword to an Oxford Economics 2013 report for UK Music entitled 'Wish You Were Here' (see next section of this Report) that *'Glastonbury is easily the world's most famous music festival – it draws in visitors from every corner of the globe and contributes more than £100 million to the economy annually'*.

In 2010, the Edinburgh Festivals are estimated to have generated new output of £245 million in Edinburgh and £261 million in Scotland, of which £59 million was new income in Edinburgh and £82 million in Scotland. The festivals supported 5,242 new full-time equivalent (FTE) jobs in Edinburgh and 4,917 in Scotland. These figures demonstrate that the events industry has the ability to make a real impact on local economies and employment.

Many visitors will arrive early at events and often leave well afterwards, thus increasing their spend. Economic benefit also derives from the hundreds of people who make the events happen: from suppliers of marquees, fencing, staging, furniture, generators, grandstands, p.a. equipment, temporary roadways, seating, sound equipment, temporary structures etc through to the provision of services such as catering, entertainment, medical units, health and safety co-ordination, heating, security and stewarding and traffic control management. There is a huge amount of infrastructure needed to make an outdoor event happen, unlike a conference venue where much of the equipment needed is already in situ.

In the outdoor event sector there are probably over 5000 main suppliers of equipment and services in the UK, plus a similar total of show organisers, local authorities and event management companies involved in many thousands of events over the whole country. Many of these work in the conference and venue market as well.

NOEA represents many companies generically but some are also members of specialist trade associations representing their particular interests e.g. mobile catering, production services, marquees etc.

Seasonality

The season for outdoor events, traditionally Easter to October, has changed dramatically due to improved equipment and planning. As a result autumn and winter events have grown in popularity such as Christmas markets and Christmas light switch-ons. Previously such happenings were not even events: someone in the town hall pressed the switch to put the lights on! They are now becoming large public events in their own right with a celebrity pressing the light switch and bands playing to a large audience. Such events, with improved equipment and the will of organisers and the demands of the public, mean that the outdoor event season is extended. The consequence of this is increased revenue for towns and increased visitors.

Organisation of Events and Current Issues

Creativity distinguishes outdoor event organisers and innovative ideas for different events and creative use of technology, equipment, and venues, have played a significant part in raising the profile and potential of outdoor events. With pop concerts being staged on beaches, beach sports events being staged in Hyde Park, and the solitary viewing of televised cricket matches being taken outdoors onto big screens for mass audiences, traditional ideas for appropriate venues are being challenged, opening up a world of opportunity for creating unique events.

Many events have developed from traditional backgrounds but are sufficiently flexible to adapt to new market trends and customer requirements. Most take place on an annual basis, often at the same location, although a few events rotate around the UK. Many events have to obtain permission from the local authority before they can go ahead officially, and must take full account of the requirements of health and safety legislation.

Health and safety issues are the number one priority for many companies and higher standards in this area have contributed to the greater professionalism now seen in the industry. After a number of highly publicised accidents in the early 1990s, NOEA drew up a Code of Practice for outdoor events, and continues to work towards raising standards. This work impacts directly on liability insurance which is crucial for the events industry. The Code of Practice was then developed into The Event Safety Guide (the 'Purple Guide') with the Health and Safety Executive. This has now been reviewed again, with NOEA and many respected professionals in the outdoor event industry working together to produce the new Purple Guide due for publication online in 2014 (see Chapter 6).

Linked to health and safety, security has become a critical issue. With event licences being granted on pre-set visitor numbers, attendance levels have to be regulated. Fencing contractors are working in conjunction with security companies, for example, to ensure effective security, particularly at high profile public events like Glastonbury and Notting Hill. This leads to greater public confidence, better attendance and good PR for the industry.

One of the biggest changes in the event industry has been the use of social media to promote events and also to ticket events with many buying online. This is good news for an industry with fragmented data as online ticketing produces new information and the ability to interact with event attendees.

Future Trends and Issues

The efforts to raise standards in the UK have been so successful that the UK is now recognised by the rest of Europe and the USA as a leader in outdoor events with many UK companies exporting their expertise.

There is much interest, from Europe in particular, in the development of a national industry standard in conjunction with the British Standards Institute, leading in the future to the possibility of a European Standard for Outdoor Events. But there is no complacency as the number of new initiatives currently being developed to take the industry forward is testament to continuing awareness of the need for good housekeeping. There are many new people coming into the industry who need to be aware of the NOEA Code of Practice/national industry standards. New standards and initiatives are always being looked at and developed and this will continue.

Research has found that the sector faces a distinct set of challenges. The outdoor events sector is very diverse and, although many events are similar in content, there are considerable differences in the organisational structure of the events and also in what they are trying to achieve. Many are collecting data but in the future that data needs to be compared accurately with consistent methods. Often data is not collected as organisers are focused on delivering the event and may lack the financial resources to pay people to collect the data. Many events are run on very limited budgets.

In summary, the economic and social benefits of festivals and other outdoor events are enormous and this area will continue to grow as consumers look for new ways to enjoy their leisure time. The one thing that this sector does do very effectively is create events that make people smile!

F) Music is GREAT : Music Events and Festivals

Value to the UK visitor economy in direct spend: £1.3 billion

Definition and Background

The live music sector covers a huge variety of events from major concerts held in stadiums and large music festivals, such as Glastonbury, which attract hundreds of thousands of people, to small local festivals that have audiences of a few hundred. In addition to these outdoor events, there are thousands of music events that take place each year indoors, held in a variety of venues from major arenas to pubs.

In its 'Plan for Growth', the Government has specifically recognised the UK's creative industries and tourism as two key economic sectors with growth potential. A National Brand Index survey, included in the Government's tourism strategy and based on interviews with 20,000 individuals worldwide, ranked the UK fourth in the world for being an 'interesting and exciting place for contemporary culture such as music, films, art and literature'. Music is an integral part of Britain's culture and heritage. It is also a key 'pillar' in VisitBritain's GREAT campaign alongside food, shopping, sport, heritage and countryside.

UK Music is the umbrella organisation which represents the collective interests of the UK's commercial music industry – from songwriters and composers, artists and musicians, record producers and music managers to record labels, music publishers, the live music sector, and music licensing societies. In 2013 UK Music, with support from VisitBritain, commissioned Oxford Economics to carry out research into music tourism's contribution to the UK economy. Published in October 2013 as a report entitled 'Wish You Were Here', key findings are summarised below – the full report can be accessed free of charge at:

http://www.ukmusic.org/assets/media/MUSICTOURISM-REPORT-WEBsite%20version.pdf

- £2.2 billion – the total of direct and indirect spend generated by music tourism in 2012
- £1.3 billion – the amount spent directly by music tourists
- 6.5 million – the number of music tourists
- 41 per cent – the proportion of live music audiences that are music tourists
- £657 – the average spend by overseas music tourists while in the UK
- 24,251 – the number of full-time jobs sustained by music tourism.

The report quotes comments made by David Cameron, the Prime Minister, when he said:

'Music is an industry that is an international success story and we should go on backing it. It's not just the exports that it provides for this country. It's not just the people it employs in this country. It's the massive and growing music tourism, people coming to Britain to listen to great acts.'

There's no doubt that the UK's music festivals and the extensive touring programmes of international acts, such as the Rolling Stones and Beyoncé, attract massive overseas interest and foreign visitors to the UK. Alongside inbound tourists, many music lovers in the UK also travel long distances to watch their favourite band and artists perform. This is international and domestic music tourism working – and working well.

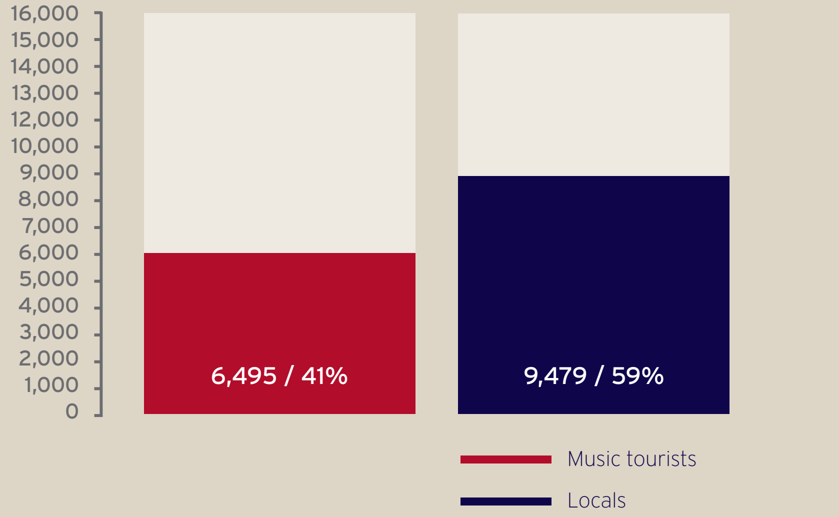
'Wish You Were Here' describes Britain's ambition to attract 40 million visitors by 2020. It says that *'music tourism already contributes to this, but the music industry can play a much bigger role in helping VisitBritain and others achieve this target. By 2020, the country targets earnings of £31.5 billion from inbound tourism – that is an additional spend of £8.7 billion. An increase in music tourism has the potential to benefit every nation and region of the UK.'*

In 2012 the music industry's rich and varied programme of concerts and festivals drew nearly 6.5 million domestic and overseas music tourists. An overseas music tourist is defined as *'someone who booked a ticket to a music event from their home address in a country outside the UK'*. A domestic music tourist is defined as *'someone who travels at least three times the average commuting distance in the Government Office Region in which the event took place in order to attend the event'*.

41 per cent of the audiences at all live music events in 2012 were either domestic or foreign music tourists (see Figure 3.17). There were far more concerts and gigs held throughout the year than music festivals: concerts and gigs accounted for 83 per cent of all live music attendances – locals and music tourists combined – while festivals accounted for 17 per cent of all live music attendances (see Figure 3.18). Concerts take place on most evenings of the week and therefore present more of a challenge to music tourists - who have to travel at least three times the average commuting distance to get there. Domestic tourists accounted for 94 per cent of the music tourist population; the remaining 6 per cent were overseas tourists. Overseas tourists were represented evenly at festivals and concerts.

Fig. 3.17

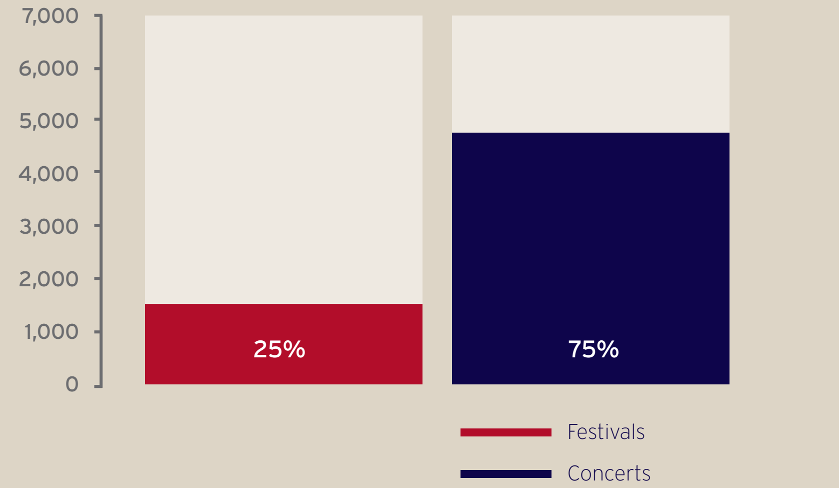
Attendance at live music events in the UK



Source: 'Wish You Were Here' – UK Music

Fig. 3.18

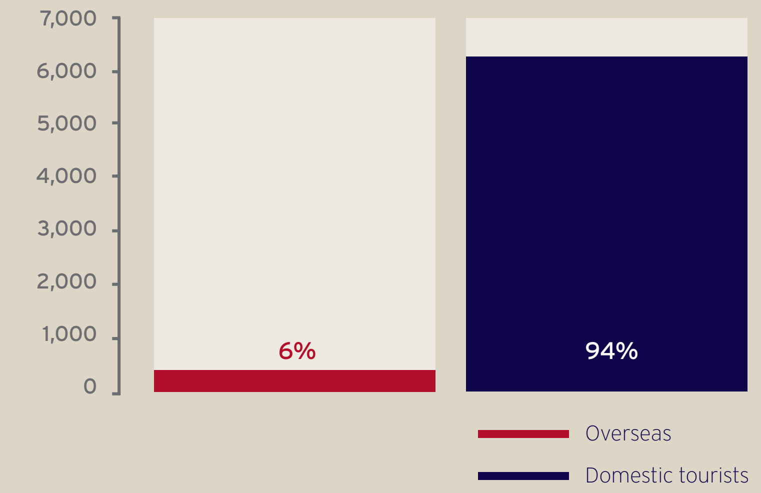
Music tourist attendance at festivals and concerts



Source: 'Wish You Were Here' – UK Music

Fig. 3.19

Domestic versus overseas music tourists

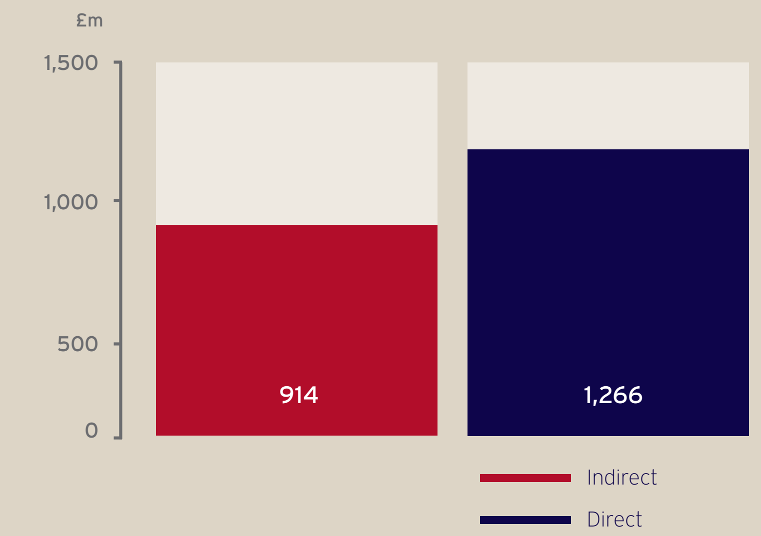


Source: 'Wish You Were Here' - UK Music

Live music is a stimulus for a large number of people to travel significant distances and they generate huge spending. This spending happens at the festival or concert and on the way there and back, which includes the purchase of tickets, transport, food and drink and, in some cases, accommodation. In 2012, music tourism generated £1.27 billion in direct spending. Music tourism also stimulated additional spending throughout the supply chain. For example, to accommodate the increased demand for food and drink created by music tourists, caterers will buy in more supplies from their wholesalers, who in turn will buy in more from their suppliers - this is additional or indirect spending. Music tourism generated a further £914 million in indirect spending, making £2.18 billion in total (see Figure 3.20).

Fig. 3.20

Music tourism spending



Source: 'Wish You Were Here' - UK Music

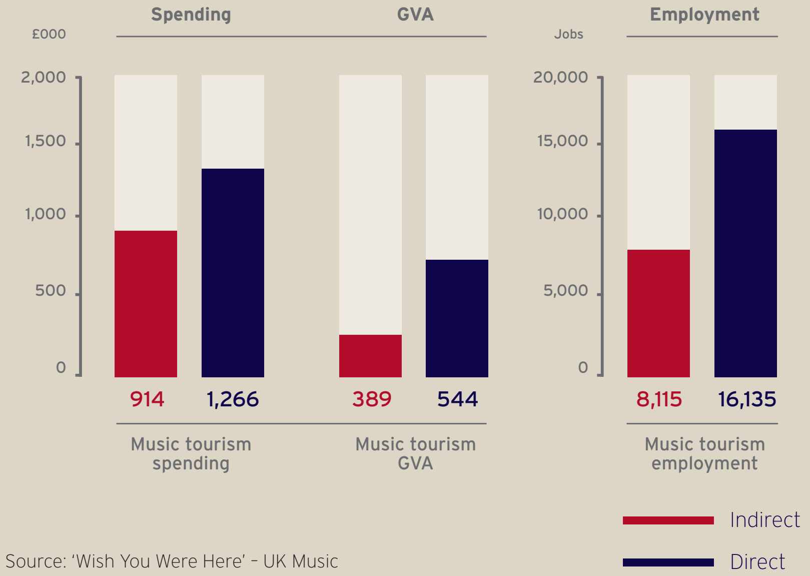
Economic Impact of Music Tourism

'Wish You Were Here' makes clear that spending generated by music tourism feeds into the wider economy and contributes to the UK's Gross Value Added (GVA). In the case of live music tourism, direct GVA was calculated by subtracting the costs of staging the live music event (excluding wages) from the revenue generated by the event. Indirect GVA took the calculation of indirect spending and subtracted the costs of production (excluding wages) further down the supply chain. In 2012 music tourism added a total of £934 million to the UK's GVA, direct and indirect combined.

Direct employment relates to the number of equivalent full-time jobs created as a direct result of a live concert or festival taking place and relates to people being taken on as security guards, merchandise sellers, lighting riggers, box office staff, etc. Indirect employment relates to the number of jobs sustained as a result of economic activity further along the supply chain, but arising from demand created by music tourism. The calculations revealed that music tourism directly and indirectly sustained 24,000 full-time jobs (see Figure 3.21).

Fig. 3.21

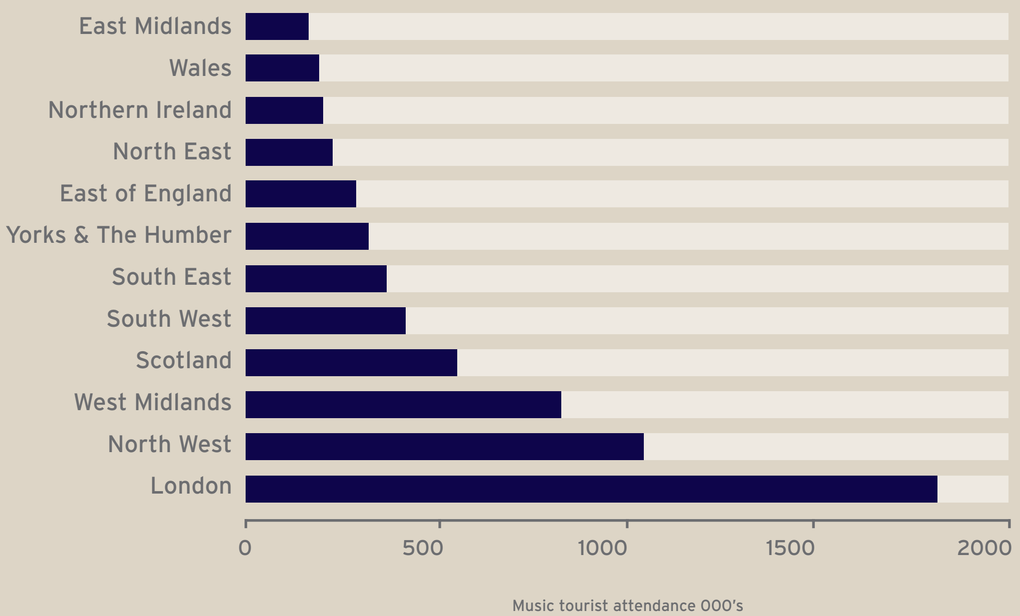
Music tourism contribution to the economy – expenditure, GVA, employment



Source: 'Wish You Were Here' – UK Music

Fig. 3.22

Music tourism in the regions and nations (of the UK)



Source: 'Wish You Were Here' – UK Music

London is the music tourism capital of the UK attracting 1.8 million music tourists. London alone accounted for 28 per cent of all music tourism visits in the UK in 2012. North-West England dominated music tourism outside the capital, accounting for 17 per cent of all music tourist visits in the UK in 2012. The region drew in more than a million music tourists out of a total live music audience of 2.87 million. Figure 3.22 provides a more detailed analysis of music tourism volume by region and nation of the UK.

But the growth of music-generated tourism in the future is not assured. The National Arenas Association reported a significant fall in attendances at music arena shows in 2010. Demand is very much linked to the supply of high profile artists such as the Rolling Stones, U2 or Madonna and their touring plans.

UK Music has, therefore, through its 'Wish You Were Here' report, made a series of recommendations designed to ensure the future growth and development of the live music sector. They are:

1. The Department for Communities and Local Government should work on developing specific, targeted 'live music zones' within communities to act as beacons for live music scenes. This could lead to a further reform of licensing laws to enable zones to apply for a relaxation of time constraints on performances in order to compete with night-time economies in other countries
2. The Department for Culture, Media and Sport should implement commitments for further deregulation of music performances
3. The Department for Environment, Food and Rural Affairs should support the Cultural and Community Distribution Deregulation Bill which aims to reduce the bureaucracy associated with handing out leaflets for small-scale gigs and events
4. The Department for Transport should look at safety on public transport following gigs and festivals and develop innovative ways to improve the experience
5. The Home Office and Ministry of Justice should look at the effect of the secondary ticketing market on music tourism, including consideration of legislative steps to combat any abuse of the market
6. The Department for Education should ensure that school careers services work with music employers to promote the wide range of highly skilled roles in the live music sector and the wider music industry
7. The Department for Business, Innovation and Skills should help employers involved in music tourism to play an active role in designing and delivering apprenticeships and training to suit the needs of the sector
8. The Foreign and Commonwealth Office, as part of its work with UKTI, should work with countries from across the world to unlock any restrictive entry practices that prevent UK musicians from being able to break into overseas markets and develop fan bases from across the world. Likewise, it should ensure that FCO staff in UK consulates around the world follow agreed policy and procedure with respect to visa applications from foreign nationals seeking to work in the UK
9. The Department for Energy and Climate Change should actively promote green practices at festivals and events to assist the Government in meeting its targets to reduce carbon emissions
10. The Department for Work and Pensions should work with venues and events to improve access for disabled people
11. The Scotland, Wales and Northern Ireland Offices, together with respective devolved governments and administrations, should work on existing and new policies to encourage music tourism.

In a debate in the House of Lords (11/07/13) a cross-party group of influential peers called on the Government to develop a new strategy to support music-based tourism and help grow the UK economy. The debate's sponsor, LibDem Lord Storey, argued that the world's "evident love" of the UK's musical heritage should now be harnessed and used to support music tourism. He suggested that, to attract more overseas music tourists, Government should emphasize and engage with existing tourism bodies and authorities across Britain and help them market themselves as music tourism destinations. Lord Storey's stance was supported by Baroness Liddell of Coatdyke who said:

'We are not doing as well as we could for music tourism. We need to have more resource behind promoting our music tourism. We have the talent, the determination and the worldwide focus. Let us make this a key pillar of our tourism strategy in the future.'

Paul Newman, Head of Entertainment & Ticketing AEG Europe – owners and operators of The O2:

'Since opening in 2007, The O2 has taken the music world by storm and has consistently hosted the world's best in music and entertainment – selling more tickets than any other arena in the world every year since its launch. For us it is all about content and customer experience. The O2 has hosted the hottest live music acts around such as Beyoncé, Rolling Stones, Lady Gaga, Take That. It's not all about the arena – we've created reasons to visit other than just big shows. indigO2, our smaller, more intimate music venue, hosts anything from the latest urban music sensation, to classical music, to comedy. The O2 bubble, our state-of-the-art exhibition space, is the permanent home to the British Music Experience, the UK's only exhibition dedicated to rock and pop.'

G) Sport is GREAT : Sporting Events

Value to the UK visitor economy in direct spend: £2.3 billion

Definition and Background

Sports tourism has been central to the growth in global travel and tourism during the new millennium. It has been suggested that, in 2008, it accounted for some US$ 600 billion or over 10 per cent of the international tourism market.

Sport also has a role to play in helping to address wider social issues encompassed by the millennium development goals. It can help to address gender inequality and assists with the development of life skills such as leadership, decision making, organisational and management skills. Sport can also act as an effective medium for conveying educational messages relating to health issues such as HIV/AIDS awareness and malaria.

The economies of cities, regions and – in the case of mega events such as the Olympic Games or FIFA World Cup – entire countries are increasingly reliant on combining sport and tourism to jump-start economic and socio-economic change. Tourists engaged in sports tourism are high-spending, stay longer than other tourist categories, and often stimulate other forms of tourism. Their direct benefit to a destination is cash – their indirect benefit can be years of follow-on tourists.

VisitEngland's 'A Strategic Action Plan for Tourism 2010-2020', published Spring 2010, includes a range of proposals to grow major events business including sport, for England, in conjunction with a variety of strategic partners. The Plan states:

'The England brand embodies many elements that give us a competitive edge internationally and not all of these relate to our traditional strengths of heritage, ceremony and landscape. England is a world leader in music, the arts, architecture and fashion and in many areas of sport. Major events in these fields, such as Glastonbury, London Fashion Week, HM The Queen's Diamond Jubilee in 2012 and a "Decade of Sport" including the Rugby League World Cup in 2013, Rugby Union World Cup in 2015 and the Cricket World Cup in 2019, can play a critical role in shaping the image of the nation. It is crucial that England develops a plan, both to capitalise on the opportunities presented by hosting the world class events of the coming decade, but also to attract and develop events in the future which will allow England to highlight and grow its reputation as a vibrant and aspirational brand.'

In one year alone, 2014, the UK will be delivering world-class sporting and spectator events with the likes of the Commonwealth Games (see case study), Giro D'Italia, Tour de France, and Ryder Cup (see below and Chapter 5 for more details of these events) all taking place on our shores and all attracting overseas participants and spectators, with many of the latter extending their visits.

The 'Gold Event Series' is UK Sport's (**www.uksport.gov.uk**) major events programme for the period 2013-2019 and has been developed to help non-governmental bodies to attract and stage some of the most important international sporting events in the UK, following the successful hosting of the 2012 Olympic and Paralympic Games. Through the Gold Event Series, UK Sport will invest over £27 million of National Lottery funding to help support the bidding and staging of major international sporting events up to 2019. A comprehensive range of new and expanded support services will also be provided to ensure that major events hosted in the UK are delivered to a world-leading standard.

To achieve this, UK Sport works closely with a network of event-hosting cities, regions and nations across the UK to help non-governmental bodies source venues and develop strong multi-tiered funding partnerships. Through the Gold Event Series, UK Sport will ensure that supported events deliver four key objectives:

- Support and profile high performance success
- Create high-profile opportunities for people to engage with sport
- Use and demonstrate the legacy of London 2012 and Glasgow 2014
- Drive positive economic and social impacts for the UK.

However, while it will often be the major sporting events that attract most attention, it should not be forgotten that there are many other less publicised, but high participation, sports enjoyed across the UK that also generate tourism, economic and social benefits for individual communities and, of course, for the participants themselves. The Case Study later in this section highlights an event generated by one such sport, pigeon racing, and describes the 'British Homing World Show of the Year' for race pigeon enthusiasts held in Blackpool.

2010 Ryder Cup Evaluation

Wales' reputation as an expert and ambitious host of major events was greatly enhanced by the week of the 2010 Ryder Cup golf match between Europe and the USA.

The formal ceremonies, hospitality and cultural events were all deemed to have set new standards of excellence, as was the whole staging of the event. Ryder Cup week itself generated £82.4 million for the Welsh economy and, since 2004, when Wales began using the Ryder Cup brand in marketing campaigns, the value of golfing tourism has nearly doubled to £41.9 million (according to the 'Final Report' published by Ryder Cup Wales 2010 Ltd in its evaluation of the event). The long-term legacy includes new and improved public golfing facilities throughout Wales and a substantial increase in player participation. It also highlights wider benefits for health, education and the environment which resulted from staging the 2010 Ryder Cup. The report suggests that:

'Wales now has the opportunity to continue to use this success, and the Ryder Cup brand, to attract other major events, to increase international tourism and support inward investment initiatives. Newport was a successful host city and can continue to benefit from association with the event.'

Table 3.2

The Economic Impact of the Ryder Cup 2010

	Total Economic Impact	Direct Economic Impact
Wales	£82.4 million	£53.9 million
South East Wales	£74.6 million	£48.7 million
Newport	£28.3 million	£18.5 million

Source: 'Final Report' – Ryder Cup Wales 2010 Ltd

CASE STUDY

Glasgow 2014 Commonwealth Games

Glasgow will host the 2014 Commonwealth Games (the 'Glasgow 2014 Commonwealth Games') from 23 July to 3 August 2014. Approximately 6,500 athletes and officials from 71 nations and territories will take part in 17 sports. Scotland, and the City of Glasgow, are expecting many thousands of visitors and spectators. There is great excitement about the summer of 2014 and a shared commitment to deliver a very successful sporting event.

The Glasgow 2014 Games will be the biggest multi-sports event that Scotland has ever hosted. A partnership between the Scottish Government, Glasgow City Council, Commonwealth Games Scotland and the Glasgow 2014 Organising Committee has underpinned the planning and delivery of these Games. The expected cost of delivering the Glasgow Games is £524 million. The Scottish Government will provide up to £344 million of this and Glasgow City Council around £80 million. The Organising Committee will meet the balance through income from sponsorship, and the sale of ticketing, merchandising and broadcasting rights. Together the Games partners are working to ensure the Glasgow 2014 Games are delivered on time and on budget.

Crucially, the Glasgow 2014 Games also provide opportunities above and beyond the hosting of a major sporting event. From the early stages of bidding there has been an emphasis on the positive and lasting benefits that could be achieved for both Scotland as a whole, for Glasgow, and the East End of Glasgow specifically. These benefits are often collectively described as the 'legacy'. ››

›› Creating a lasting and positive legacy from the Glasgow 2014 Games is a top priority for the Scottish Government. Legacy activity will help deliver the national government's wider aspirations for Scotland over the next decade. The Scotland-wide Games legacy plan 'A Games Legacy for Scotland' was launched in September 2009 and sets out the legacy ambitions of the Scottish Government and its wide range of partners. More information is available at: http://legacy2014.co.uk. With a ten-year timeframe to 2019, it is set around four themes:

FLOURISHING – using the Games to contribute to the growth of the Scottish economy

ACTIVE – using the Games to help Scots be more physically active

CONNECTED – using the Games to strengthen connections at home and internationally through culture and learning

SUSTAINABLE – using the Games to demonstrate environmental responsibility and help communities to live more sustainably

The City of Glasgow has identified 6 legacy themes which broadly fit with the four national themes above. These are: Prosperous, Active, Inclusive, Accessible, Green and International. More detailed information on Glasgow's legacy plans is available at: **http://glasgow.gov.uk/en/AboutGlasgow/AGamesLegacyForGlasgow**

Glasgow City Council (with the support of the Scottish Government and partner agencies) has led on a programme of major capital projects for the venues, the Athletes Village and the transport infrastructure in Glasgow. Projects include the Scotstoun Stadium, Kelvingrove Lawn Bowls Centre, the Commonwealth Arena, the Emirates Arena (home of the Sir Chris Hoy Velodrome), Tollcross International Swimming Centre, Cathkin Braes Mountain Biking Circuit, Glasgow National Hockey Centre, and Scotstoun Leisure Centre. The Hydro Arena has also been developed as an entirely new venue adjacent to the Scottish Exhibition + Conference Centre. Venues outside Glasgow have also been refurbished, including the Royal Commonwealth Pool in Edinburgh and the Barry Buddon Centre in Angus (to play host to the shooting competition).

The Games have already brought other benefits to Glasgow, including:

- Several hundred 'new entrant' trainees (apprentices, those leaving education and those leaving long-term unemployment) were recruited to various Games-related construction projects
- Glasgow-based businesses and organisations have won a large share of Games-related contracts (by early Autumn 2013 over £183 million of £307 million Tier 1 Games-related contracts)
- Other Games-related projects have made a substantial impact for people in Glasgow, with the Commonwealth Apprenticeship Initiative delivering places for more than 2,500 school-leavers, while the Commonwealth Jobs Fund has placed over 300 people in employment.

Councillor Gordon Matheson, Leader of Glasgow City Council, said: ***'The economic legacy from 2014 will leave a city whose workforce is better skilled and whose companies are better placed to win contracts at home and abroad. We are taking advantage of this great opportunity for the city.'***

CASE STUDY

Pigeon fanciers flock to Blackpool for British Homing World Show of the Year

Thousands of pigeon fanciers were set to 'land' in Blackpool on the 18th and 19th January 2014 as the resort once again played host to the British Homing World Show of the Year.

The show attracts more than 15,000 people from the UK and Ireland to the event to see over 1,000 fancy show pigeons and 2,000 racing pigeons.

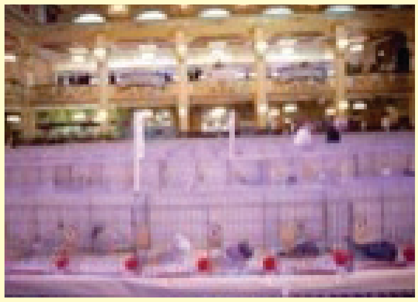
Organised by the Royal Pigeon Racing Association (RPRA), and dubbed as the 'Crufts of the pigeon world', the event is the largest in the world and sees fanciers of all ages from all regions in the UK making the annual pilgrimage to Blackpool to celebrate. This is the 37th year the event has been held in Blackpool, since it was founded in 1972 - the show has raised almost £3 million for charities over the years.

Taking place in the Winter Gardens, the 2014 event featured more than 200 trade stores selling anything from pigeon food to articulated lorries for pigeon transportation. Thousands of pigeons were expected to change hands at the event where sums of up to £10,000 can be paid for a pedigree racing pigeon or its offspring.

On the Saturday evening there was an award ceremony in the Blackpool Tower Ballroom as fanciers compete to win awards such as Best Young Fancier to Exceptional Pigeon Performance with Best in Show going on to the Supreme Champion Class.

Commenting on the event, Stewart Wardrop, General Manager at The Royal Pigeon Racing Association, said:

'We are delighted to be returning for the 37th time to Blackpool for the 42nd year of the British Homing World Show of the Year. The Winter Gardens is a great home for the event and somewhere our members look forward to visiting year on year.'



Mandy Tythe-McCallum, Tourism Manager at VisitBlackpool, said:

'The British Homing World Show of the Year is the biggest racing pigeon event in the world. Each year the event brings together thousands of old friends, at what is also the biggest social event in the pigeon fancier's diary. It is an internationally acclaimed event which has made its home in Blackpool's Winter Gardens. Events like these mean a lot to the local economy, offering a welcome boost to tourism in the resort.'

H) Technology is GREAT : Events Sector Suppliers

The event industry is hugely diverse and its requirement for suppliers covers an enormous breadth of professions, from staging and structures to water and waste.

This diversity of events, together with the unique demands of some venues particularly for outdoor events, has required the development of specialist skills in many areas and the UK industry is widely recognised as a world leader in some of these sectors.

Whilst there is some cross-over between markets, sectors tend to have their own specialist supplier networks that understand the logistics and issues involved in putting on professional events.

By its nature the event industry tends to be highly entrepreneurial, which encourages innovation. However, the last decade has seen it also becoming increasingly professional in its approach with a great deal of time being devoted by event organisers and suppliers to developing professional standards across the market, from specialist guidelines for the erection of temporary structures and stages to information such as the 'Purple Guide' for those organising events.

There are also now an increasing number of courses run by colleges and universities for event management as well as specialised training in areas such as stewarding and crowd management. This trend is likely to increase as the industry continues to grow and demand more professional standards.

There is no statistical data on the number of suppliers operating in the events industry but it is thought to be considerable, ranging from small entrepreneurial businesses to substantial companies, many of which operate internationally. Some examples of suppliers servicing the meetings and business events sector are listed below:

- audio-visual contractors (supply and operation of specialist audio-visual equipment)
- telecommunications and IT companies (videoconferencing/teleconferencing/ satellite conferencing, 'second life' events)
- transport operators (airlines, coach and rail companies, car hire, taxi firms, ferry companies)
- interpreters and translators (for international conferences)
- after-dinner speakers, entertainers, corporate events companies (e.g. companies running 'Murder Mystery' events, sporting and outdoor activities)
- speciality caterers (banquets, receptions, buffets)
- floral contractors (flower displays for conference platforms, registration areas, exhibition/exposition stands)
- exhibition contractors
- companies which develop specialist computer software and apps (e.g. venue finding and event management programmes)
- event insurance specialists.

Chapter 4

Exporting is GREAT

UK Trade & Investment (UKTI)

Events support...

UK Trade and Investment (UKTI) is a government department which works with UK-based businesses to ensure their success in international markets, and to encourage the best overseas companies to look to the UK as their global partner of choice. It has professional advisers both within the UK and in more than 100 international markets. UKTI also has a coordination role across government to establish a more systematic approach to relationships with companies which are the most economically significant investors and exporters.

UKTI's specific aims and objectives are to:

- deliver measurable improvement in the business performance of UKTI's international trade customers, with an emphasis on innovative and R&D-active firms
- increase the contribution of foreign direct investment to knowledge intensive economic activity in the UK, including research and development (R&D)
- deliver a measurable improvement in the reputation of the UK in leading overseas markets as the international business partner of choice.

UKTI undertakes activity in a range of priority industry sectors, which include, inter alia:

- Advanced manufacturing
- Defence and security
- Infrastructure
- Healthcare and life sciences
- Service sectors including
  - Creative industries
  - Education
  - Professional services
  - Retail

It is anticipated that many of these industries will benefit the events sector by bringing with them major business-focused events and corporate organisations will, in turn, invest in meetings, conferences and training.

UKTI staff act as ambassadors for the UK events industry, using events around the world – in the form of trade exhibitions, roadshows and forums – to attract businesses to the UK. UKTI has also identified key industry events held in the UK and overseas where it supports UK companies, helping SMEs to exhibit and present their products more effectively and offering export advice. There is more that can be done to develop a closer working relationship, which in turn would support bidding for more major events to be held in the UK and enable greater global competitiveness.

There are several UKTI programmes which are directly relevant to the events sector. Among these are:

Tradeshow Access Programme (TAP)

Taking part in overseas exhibitions is an effective way for UK businesses to test markets, attract customers, appoint agents or distributors and make sales. UKTI's Tradeshow Access Programme (TAP) provides grant support for eligible small and medium-sized enterprises (SMEs) to attend tradeshows overseas. Participation is usually as part of a group and is led by one of UKTI's Accredited Trade Associations (ATOs). ATOs also work with UKTI to raise the profile of UK groups and sectors at key exhibitions.

The main aims of TAP support are to provide a credible, quality representation of UK business capability to an international audience and encourage market entry for SMEs. TAP funding can provide both a more enhanced UK presence at overseas events andfacilitate individual grants for eligible participating companies. TAP has a budget of £15.4 million for 2012/13, with an indicative budget of £12 million for 2014-5.

The scheme is based around an agreed programme of overseas events where Accredited Trade Organisations (ATOs) will organise and lead UK groups. Where relevant, ATOs will agree with UKTI how best to enhance the group presence and are then responsible for implementing these enhancements.

Grants for eligible SMEs may be available towards costs connected with exhibiting at an overseas exhibition where the business spends at least the equivalent of the grant on eligible cost. Grants for group-led exhibitions range from £1,500 for European events, £2,000 for long haul events and £2,500 or £3,000 for events in emerging or high growth markets. A list of emerging and high growth markets is given below.

TAP Solo grants may be available for eligible companies wishing to take part in events independently, where the event is not part of the ATO-led programme. TAP Solo grants are always set at £1,250 and can only be taken up with the agreement of a UKTI International Trade Adviser (ITA) located within UKTI's regional offices.

The provision of grant support is designed to enable businesses to acquire market knowledge and experience as part of a strategic approach to exporting. Contact between companies and ITAs is an important part of this development process as ITAs can also provide or signpost to other forms of advice and help.

Grant support is aimed at less experienced businesses. The full eligibility criteria, grant levels and process for applying for grants can be found on the TAP landing page on UKTI's website at: **http://www.ukti.gov.uk/tap**

Businesses can use a maximum of 12 grant lives as long as 6 of these are taken in the emerging and high growth markets with lives counted from 1 April 2009. Where applicants are new to the TAP scheme their participation must always be endorsed by an ITA, whether taking part with an ATO-led group or on a solo basis. Grant application forms are obtained via the relevant ATO (see the programme of events on UKTI's website) or, in the case of TAP Solo grants, from the ITA.

Emerging and High Growth Markets are: Brazil, China, Colombia, Egypt, India, Indonesia, Malaysia, Mexico, Qatar, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Taiwan, Thailand, Turkey, UAE, Vietnam, plus Hong Kong.

UKTI Events Alliance Initiative

In July 2013 UKTI published an outline strategy for the events sector including the Events Alliance initiative. They will work with event organisers to increase the number of UK and overseas trade-related events supported by UK Trade & Investment from 75 to 300 core events over the succeeding 18 months. Core events are events which have major significance for the industry sector and are part of the annual UKTI programme. The strategy paper summarised the benefits it can bring for event organisers and also listed a number of areas in which its own role and effectiveness could be enhanced (see below).

UKTI Benefits for Event Organisers

UKTI has identified a number of benefits that it can bring to UK event organisers. These include:

- Reputational advantages
- Endorsement
- Connecting buyers and suppliers
- Bringing international buyers to UK shows
- Introducing new or inexperienced exporters with support at overseas exhibitions through the Accredited Trade Organisations (ATOs) and Tradeshow Access Programme (TAP) funding to the organisers
- Promotion of shows through the UKTI regional offices and UKTI's overseas offices based in Embassies, High Commissions and Consulates General
- Providing Ministers and key note speakers
- Content and knowledge expertise
- Database usage through its virtual site
- Social networking opportunities
- Introducing innovative new businesses through overseas missions that can include trips to trade fairs
- PR opportunities
- The SOLO scheme for individual companies attending overseas smaller or niche events without an ATO-led group delivered through TAP.

Potential Benefits for UKTI

- Accessing other UK businesses through UKTI participation at trade fairs and introducing them to UKTI services
- Reaching new SMEs who are ready to export
- Business lounges to deliver UKTI services on the main exhibition floor
- Where there are international lounges, UKTI should be able to work more closely with the organiser to connect buyers and suppliers
- By influencing and registering online British visitors and exhibitors, both those who are known and those who are not known, UKTI can organise and deliver highly effective missions based on this intelligence
- UKTI would like to have more interaction with the visitors to the fairs in order to introduce them to UK SMEs
- UKTI would be able to improve its database of UK SMEs so that it can reach out to and help grow their businesses
- UKTI agrees with the organisers that, as part of its endorsement of their event, both exhibitors (on signing their contract) and visitors (on registering to attend) should receive a targeted message from the organisers on UKTI's behalf introducing the services that it has on offer to help them and encouraging them to register with UKTI online to receive a raft of other benefits
- Organisers should invite UKTI to join their advisory boards to play a deeper role in the content direction and delivery of the event.

Further Developing Links and Partnership Working between UKTI and the UK Events Sector

In addition to the programmes described above, there are other current and possible future initiatives designed to strengthen and extend the practical links between UKTI and the UK's events sector. These include:

1. The 'Britain for Events' promotional campaign is preparing a guide to UKTI's role, highlighting its objectives, the growth pathways, the high value opportunities and priority industry sectors. This will serve to explain how UKTI uses events to develop its own interests and those of the businesses it advises. 'Britain for Events' in conjunction with the Events Industry Alliance's 'FaceTime' programme will be used to disseminate information about the ongoing work of UKTI and to share best practice in relation to optimising export and inward investment initiatives through the medium of live events.

2. BVEP has been working with VisitBritain to extend the 'You're Invited' programme initiated by VisitBritain. Previously this encouraged UK residents to invite friends and family to the UK for holidays. There is a substantial opportunity to remodel the programme to urge UK businesses to invite their regional offices, subsidiaries, affiliates, clients, agents and dealerships to hold their meetings and business events in the UK. This is particularly timely given the enormous positive exposure generated by the 2012 Olympics. UKTI could use its business database to help in disseminating information and a bespoke toolkit to its business contacts.

3. The Association of Event Organisers (AEO) is keen to work with UKTI to extend UKTI's engagement and training with small businesses in order to promote the benefits of exhibiting and attendance at trade shows and business events, through the 'How to Exhibit' programme. There is an important role for the UK's overseas commercial offices to promote UK trade events and also to further support shows organised by UK organisers that are held overseas.

4. VisitEngland and the Department for Culture, Media and Sport are working together on a 'Ministerial Bid Support Initiative'. This will set out a code of practice for Whitehall Departments and Government agencies to follow when bidding to bring international events to the UK. The intention is to involve Ministers in the bidding process, welcoming delegations and officiating at event ceremonies. It would be helpful to have UKTI involved in this support process and to be able to involve UKTI directors and senior business leaders from specific industry sectors as ambassadors to support bids. UKTI's 'Ambassador Programme' could be very pertinent to this initiative.

5. Events have been included in the 'GREAT Britain' programme. Number 10 Communications Unit has approved two posters for this purpose. On the back of the Olympics' success, it is evident that events form a significant component of the nation's offering. There is a desire to develop how this strand of promotion can be incorporated in the overall programme being managed by UKTI.

6. VisitEngland wishes to develop a closer working relationship with UKTI and its 'TAP' programme to determine how best to support its international sales missions and its exhibition presence at overseas trade shows. It is also proposing an arrangement whereby local buyer insights and contacts in key markets can be shared between local UKTI offices and VisitEngland staff.

Further information on UKTI: **www.ukti.gov.uk**

Chapter 5

Heritage is GREAT

National Perspectives from England, Northern Ireland, Scotland and Wales

Events support...

This chapter describes business visits and events activity across the four countries that make up the United Kingdom. It gives details of the strategies and initiatives of the respective national tourist boards designed to support and enhance the events sector. Information on VisitBritain's strategy in support of events is given in Chapter 2.

England: visitengland

VisitEngland is the National Tourist Board for England. It is the custodian of the Strategic Framework for Tourism 2010-20, England's tourism strategy, which was created in consultation with industry, and sets out a ten year plan to grow the value of tourism by 5 per cent year on year and increase tourism jobs by 225,000.

Partnership working is central to VisitEngland's philosophy and it works collaboratively with a number of stakeholders including: Government departments; destinations; local authorities; Local Enterprise Partnerships; the private sector; and national agencies to deliver the Framework's objectives to grow the visitor economy.

VisitEngland's purpose is to ensure that tourism in England thrives. It does this by leading and driving forward the quality, competitiveness and sustainable growth of England's Visitor Economy by providing strategic direction, intelligence and coordinated marketing for the sector. At its core it is committed to supporting the industry in order to achieve better marketing of England, better experiences for visitors and better operating conditions for industry.

A key area of focus for VisitEngland is to grow and support business tourism in England in line with the overall goal of 5 per cent year on year by 2020. The Strategic Framework for Tourism set outs four key objectives for the business events sector in England:

1. To maximise England's strong and competitive brand values in marketing it as a business destination
2. To lever England's expertise in medicine / science, academia and industry to gain competitive advantage
3. To ensure all England's facilities, products and services continue to meet market needs to increase England's competitive success
4. To ensure the importance of business tourism by maintaining a high profile with public and private stakeholders.

VisitEngland's priority is to promote England as the destination of choice for international business events including meetings, conferences, incentives and exhibitions. A dedicated team based at VisitEngland's headquarters in London is supported by a team of overseas representatives based in Europe, North America and India. Their job is to support the English trade in order effectively to reach international business events organisers by providing market insights, research, maximising sales leads and offering advice and tools for business events organisers.

Working with key industry partners such as UKTI, transport providers and industry associations, VisitEngland is best placed to advise Government on the future strategy relating to business events and secure Ministerial support for international conference bids. VisitEngland's work is also focused on encouraging the industry to establish and share best practice and undertake competitive analysis.

A key area of growth and focus is maximising the value for tourism from major events. International sporting competitions such as the forthcoming Tour de France 2014 and the Rugby World Cup 2015 offer tourism in England unprecedented opportunities to showcase host destinations and promote sporting tourism in England.

New Event Bidding Protocol

In October 2013 it was confirmed that a Ministerial Bid Support Initiative had been established, designed to create a more expeditious process for garnering the support of key government ministers when bids are being made to attract major international business events to the UK. The Ministerial Bid Support Initiative will be managed through VisitEngland working closely with the Department for Culture, Media and Sport (DCMS) and will be applicable to international congress and convention bids. It aims to identify ways in which Government can play a role in supporting event bids from UK destinations. Simon Gidman, Head of Business Visits & Events for VisitEngland, comments:

'The support of Ministers can have a major impact on the winning of major convention business. VisitEngland, in partnership with England's leading events destinations, is targeting international events from our priority economic sectors including life sciences, energy, engineering and the creative industries. These events bring together thought-leaders from around the globe and we want to ensure these influential leaders are discussing and debating the latest issues in their field in England.'

For further information on England, visit: **www.visitengland.com/business**

CASE STUDY

ICEBO 2012 Manchester

The International Conference for Enhanced Building Operations (ICEBO) 2012 was held from 23 - 26 October 2012 in Manchester, England, at the Hilton Manchester Deansgate. The Centre for Construction Innovation, University of Salford, was delighted to host such a prestigious event and, in doing so, work alongside the Energy Systems Laboratory located at Texas A&M University.

ICEBO is the leading forum for a timely exchange among individuals interested in the continuous improvement and maintenance of buildings, design, their energy usage and environmental impact. The format consists of a series of technical and invited panel sessions, during which officials, building experts and implementers make brief (12 -15 minutes) presentations, followed by a facilitated discussion.

The 2012 ICEBO conference attracted 112 international delegates from countries including the UK, Belgium, Germany, Spain, Portugal, Netherlands, Finland, Austria, Switzerland, Kuwait, Saudi Arabia, Japan, China, Australia, New Zealand, United States and Canada.

ICEBO 2012 saw the delivery of 52 research paper presentations from an international group of leading practitioners, policy makers and researchers who routinely improve the health and comfort and minimize the energy consumption, operating costs and environmental impacts of buildings. The topics covered at ICEBO 2012 were related to the organisation's or individual's recent or current work in the themes listed below and focussed on specific outcomes and achievements:

- Best practices and policies in commissioning existing and new buildings
- Enhanced building operation, controls and emerging technologies
- Government programmes for high performance buildings and enhanced operations
- Social and economic implications of enhanced building operations.

Running alongside the research paper programme was a series of industrial workshops.

The conference boasted a broad range of keynote speeches from leading professionals in the Built Environment sector.

During the conference delegates were also provided with the perfect networking opportunity at an evening reception held at the Manchester Town Hall, sponsored by Visit Manchester, where conference guests were amazed by the Town Hall's stunning architecture and murals. Manchester's ICEBO ended with a visit to Salford University's Energy House, the world's first of its kind, followed by a guided tour of Manchester's mix of modern and historical buildings.

Roy Stewart, Director of the Centre for Construction Innovation (CCI) and ICEBO 2012's Conference Host, commented

"CCI and the University of Salford were extremely delighted to be given the opportunity to host such an esteemed event in Manchester. The conference was a great success and the quality of presentations and workshops was outstanding. Moving forward, this conference has given the University of Salford a springboard to develop further collaborations within the construction industry with like-minded professionals and academics based overseas. A special thank you must be given to our contacts at Visit Manchester who were integral in securing the City of Manchester as the conference venue. Without the support of Visit Manchester's Conference Ambassador Programme, ICEBO 2012 would not have been hosted within our great City."

NORTHERN IRELAND: Northern Ireland Tourist Board

Northern Ireland Tourist Board (NITB) is a non-departmental public body and a member of the Department of Enterprise, Trade and Investment (DETI) family within the Northern Ireland Government. NITB is responsible for the development of tourism in Northern Ireland and its promotion in the country as well as marketing in the Republic of Ireland.

The events industry has a role to play in shaping and delivering the objectives set out by the Draft Tourism Plan for Northern Ireland. Tourism is now viewed as a sector that can make a real and tangible contribution to the Northern Ireland economy. Currently Northern Ireland welcomes approximately 3.3 million visitors spending circa £500 million and supporting 40,000 jobs. By 2020 it is hoped a clear vision for tourism will in turn increase employment supported by tourism to 50,000 jobs, drive visitor numbers to an unprecedented 4.5 million per annum and double the revenue generated to £1 billion. The vision for tourism in Northern Ireland is to create a Northern Ireland experience that will sit on everyone's destination wish list.

NITB's ambition is to *'double the income earned from tourism by working together to grow tourism to the benefit of all'*.

The vision for events in Northern Ireland:

'Northern Ireland to be known as the home of great events featuring a strong annual tourism event programme consisting of Major Bid Events, attracted to and be held in Northern Ireland, supported by core International and Sponsorship events. These events will cover a range of interests and regions. They will be visitor-inspired, showcasing Northern Ireland's reputation for delivering best-in-class events on a global stage whilst positively impacting on the Northern Ireland economy, visitor numbers and profile of the area.'

In the context of this, the objectives are to:

1. Create a sustainable visitor-inspired events future for Northern Ireland
2. Develop a progressive, diverse and cohesive events industry, attracting significant additional visitors and revenue into the economy of Northern Ireland
3. Bid for and attract high profile, international scale events to Northern Ireland that have the potential to showcase its landscapes, cities and characters in a positive light to audiences around the world
4. Develop events with international appeal/profile 'hosted' in Northern Ireland and drive Northern Ireland brand by being built around key/major themes and demonstrating quality and authenticity
5. To build on the legacy of ni2012 and 2013 UK City of Culture years
6. To create a culture of attending events.

The focus for NITB includes:

1. Bid for/host at least one major global scale event each year (subject to budget)

The aim is to achieve this by supporting another partner body/bodies who would deliver the event on the ground. This major event bid would take place in a suitable region in Northern Ireland and would be of such a significant scale that it would attract visitors and participants to travel to Northern Ireland to attend this event. It would also be anticipated that this event would generate substantial international media coverage, preferably TV, allowing positive images of Northern Ireland's iconic landscapes and cities to be broadcast around the world.

2. Business Tourism

Following a review of Business Tourism in 2009/10, the Northern Ireland Business Tourism Plan 2010-2013 was developed. Its overall objective has been to maximise the contribution that Business Tourism makes to the economy of Northern Ireland (NI) through positioning NI as a competitive and appealing destination in the global Business Tourism market. This Plan sits in the wider context of the NI Tourism Strategy 2010-2020 and it should be considered in conjunction with this as well as NITB's Corporate Plan. The continued delivery and drive of the plan are monitored by the Business Tourism Product Development Group (PDG). This group is comprised of a private sector chair and key stakeholders representing various segments of the industry.

The key aims of the plan are:

- To maximise promotional opportunities to attract Business Tourism to NI, ensuring the best use of public and private sector marketing funds
- To focus on key Business Tourism segments which will drive business to NI
- To encourage the tourism industry, public agencies and policy makers to work together to promote NI as a Business Tourism destination

- To influence levels of investment necessary, particularly in infrastructure, to attract more business visitors, in particular conferences to NI and sustain the success achieved so far within this sector
- To ensure NI delivers a quality Business Tourism experience through on-going development in terms of capability and service, in line with the new NI brand attributes.

Over the last few years a number of key areas have been delivered including:

- Belfast Subvention Programme has been established
- Derry Subvention Programme has been established
- Outline approval has been granted for the extension to the Belfast Waterfront Convention Centre which will incorporate 2,500m2 of exhibition space, 5 new breakout rooms (200 delegates) and up to 750 delegates for a gala dinner. Open for business early 2016.

a. Key Implications

A number of key strategic issues were identified by the Business Tourism Visitor Attitude Survey 2010, these included:

- Lack of conference subvention
- Limited conference exhibition space within the main Conference Centre
- Limited direct air access
- Quality of service provision, around the business tourism elements but also wider, and particularly in relation to the food offering
- Product integration across the various business tourist touch points

Furthermore the review highlighted the need for a focused approach, with agreement around roles and responsibilities - this has now been achieved.

The move in leisure tourism towards experiential tourism will also support the Business Tourism sector, particularly in terms of pre- and post-conference product and incentive travel. In this regard it will be important that these experiences are developed as 'best in class' in order for NI to use them in the promotion of Business tourism.

b. Key Strategic Direction/Future Priorities

A number of the issues raised in 2010 have since been rectified. In particular both Belfast and Derry-Londonderry have a Conference Subvention Programme and the Waterfront Hall is being extended to include additional exhibition and breakout facilities. However, going forward, there are a number of important future priorities:

- Direct Air access is important (growth in the Business Tourism sector is heavily reliant on direct access)
- Focused approach from all strategic partners - Visit Belfast has a key role to play in securing Association conference business for the city
- Corporate conferences are another key area for the city and it has been agreed that this needs to be delivered via a two way partnership with Visit Belfast and Invest NI
- Incentives are a niche but highly lucrative market and should access the 'best in class' experiences to ensure NI stands out.
- Continued investment in the Conference Subvention Programme for both cities
- Continued investment in the product quality, particularly in relation to the service provision and around the food offering
- Continued partnership working towards integrated packaged solutions for the business tourism visitor
- Business tourism market is highly competitive and Belfast and NI need to ensure stand out through the brand and the experiences being offered – what makes NI different?
- Establish an industry 'incentive' group which can work together to develop 'best in class' experiences and clustering of product offerings
- Support Belfast and Derry-Londonderry in their Conference Subvention Programme.

c. Implications for the Industry

The industry has a key role to play, particularly in relation to the quality of the business tourism product and visitor experience. In this regard they need to develop 'best in class' products and experiences that afford NI standout in this busy market place. Belfast and Derry-Londonderry also play a key role in driving the conference market and it is important that Visit Belfast, in particular, has an agreed delivery plan and meets agreed sales targets each year. This will be particularly important to ensure a return on investment for the Waterfront Hall extension. In brief, there are a number of key areas the industry needs to continue to develop:

- Ensure the quality of the product, particularly in relation to service delivery
- Develop 'best in class' experiences which will appeal to this segment
- Work together to package the product into authentic experiences

- Continue to develop direct access routes, particularly to key business tourism hubs
- Work with NITB to ensure up-to-date research information is available (openly and positively participate in any Business Tourism Barometer)
- Visit Belfast to ensure continued focus and resources behind their business tourism sales plan
- Visit Belfast to work in partnership with Invest NI to develop and grow the corporate conference market
- Industry to support Visit Belfast and Derry Visitor & Convention Bureau when bidding for conferences, particularly in terms of providing rooms/rates.

Attracting existing major events to Northern Ireland and encouraging new ones

Ni2012: our time our place will go down in history as the year the Northern Ireland government, the tourism industry, stakeholders and NITB pulled together like never before – with inspiring results. It was the year the amazing £97 million Titanic Belfast, the world's largest Titanic visitor experience, opened its doors, as did the highly anticipated £18m Giant's Causeway Visitor Centre and the MAC-Belfast's newest arts centre.

Volume was pumped up for MTV Presents Titanic Sounds on the Titanic slipways and lit up the night with an unforgettable digital light show, which generated £22m with a return of £25 to £1 on public money invested. The event reached a global TV audience of 1.2 billion people and was covered by 130 media organisations. This event clearly put Belfast and Northern Ireland on the global stage and it is from this stage that NI can move forward in securing other similar type and larger scale events.

Sports fans showed their support at The Irish Open, held at Royal Portrush – this was the first time the Irish Open had been held in Northern Ireland in over 60 years and came at the time when Northern Ireland home-grown golfers were enjoying global success. In addition, Royal County Down and Royal Portrush regularly appear in rankings for the world's top courses and were recently listed as Numbers 1 and 7 best courses respectively outside the USA. The fantastic Irish Open attracted more than 130,000 people and became the only European Tour event in its history to sell out.

NI also played host to a series of high profile London 2012 Festival events such as Land of Giants, Peace One Day and FLAGS at the Giants Causeway.

By the end of 2012, there had been investment of £300m in tourism-related infrastructure. Ni2012 was a once in a lifetime opportunity to showcase this new, vibrant and developing Northern Ireland to the world.

Events in 2013 and 2014

2013 has been Derry-Londonderry's year as the inaugural UK City of Culture. It presented an opportunity to celebrate the city's rich cultural and musical heritage and provide a lasting legacy for future generations. The City of Culture 2013 programme of approximately 120 events promoted the city, providing opportunities for local businesses throughout 2013 and beyond. Some of the highlights included The Return of Colmcille, Fleadh Cheoil na h Éireann, The Walled City Tattoo, Lumiere, The Turner Prize, Walls 400, The Maiden City Festival 2013 and City of Derry Jazz and Big Band Festival.

NI also hosted the prestigious World Police and Fire Games in 2013, the third largest multi-sport games in the world after the Olympics and World Masters Athletic Championships, which included 57 sports activities in 42 venues across Northern Ireland.

Giro d'Italia

The Giro d'Italia is an annual multiple stage bicycle race held for professional cyclists over a three week period in May. The Giro is hosted primarily in Italy – however, since 1996, there has been a tradition for the Big Start ('La Grande Partenza') to be held outside Italy. The Giro is one of the three Grand Tours (the others being the Tour de France and the Vuelta a España) and is part of the UCI World Ranking Calendar. The Giro has been held outside of Italy on 10 occasions, but never before in the United Kingdom and Ireland.

The lead jersey of the Giro is pink. The Giro use the term 'fight for the pink' to focus on the huge competition for this prestigious symbol of the Italian cycle tour.

The Big Start of the Giro in Northern Ireland will run from the 9th to the 11th of May 2014 and will consist of both team trial and road races visiting parts of Northern Ireland including Belfast, Causeway Coast and Armagh before travelling to Dublin. The Grande Partenza is the opening stage of the Giro which lasts six days. The first three days are preparation for the Giro start, while the remaining three are the actual race days which include road races and time trial. These six days normally have some form of festival activity connected to them, with the potential for actual race day festivals being geographically spread across a city and / or region.

Already there is a host of activities planned around the 2014 race to mark the event and to make the Big Start in Northern Ireland one of the most memorable in the race's 96-year history. With Northern Ireland having so much to offer both the experienced and novice cyclist, it is hoped that the event will encourage people to take to their bikes and explore cycling in Northern Ireland.

Northern Ireland expects that the event will generate a minimum of £10,000,000 of media coverage and be viewed by at least 800,000,000 people worldwide.

For further information visit: **www.discovernorthernireland.com/convention**

SCOTLAND: Visit Scotland

VisitScotland, the national tourism organisation for Scotland, has as its main aim to contribute significantly to the advancement of Scottish tourism by giving it a real presence in the global marketplace and benefiting the whole of Scotland.

VisitScotland's Corporate Plan directly supports the Scottish Government's Economic Strategy and outlines how it will contribute to the government's purpose of increasing sustainable economic growth. It sets out five corporate objectives which are closely integrated, with linkages and interdependencies between each one:

1. **Marketing:** VisitScotland will market Scotland and its outstanding assets to visitors from all parts of the world, including the promotion of Scotland to people living in Scotland to visit different parts of the country
2. **Information provision:** VisitScotland will provide information and inspiration to visitors, both locally and globally, via their preferred choice of medium
3. **Quality and sustainability:** VisitScotland will provide support and advice to businesses, with the goal of improving the quality and sustainability of the tourism sector in Scotland. It will provide assurance to visitors through its Quality Schemes
4. **Working in partnership:** VisitScotland will listen to and work with the industry, partners and stakeholders to shape its offering and support
5. **Events:** VisitScotland will maximise the benefits from the "Winning Years" and their legacy. It will implement the national events strategy, and sustain, develop and promote Scotland's international profile as one of the world's foremost events destinations.

EventScotland

EventScotland is the national events agency. Established in 2003, EventScotland works to generate, bid for, attract and sustain events which will drive tourism and create international profile for Scotland. EventScotland is dedicated to leading Scotland's events industry and strengthening the nation's position as a world class events destination.

In 2008 EventScotland launched the new national events strategy *Scotland: The Perfect Stage*. This document provides a framework for Scotland's events industry and outlines the ambitions which will lead the industry into 2020.

EventScotland staff are experts in their field and work to further establish Scotland as a perfect stage for events and a world leader in the events industry.

Scotland Welcomes the World

In 2014 Scotland welcomes the world with three major events: The Ryder Cup, Glasgow 2014 Commonwealth Games and the return of Homecoming Scotland. The world will watch as Scotland plays host to a programme of events of global profile and welcomes participants, visitors and the media from across the world.

VisitScotland has announced details of events and marketing activity happening across Scotland as part of the Homecoming celebrations, as well as a multi-million pound marketing campaigns to promote the Commonwealth Games and The Ryder Cup across the globe.

The **Year of Homecoming Scotland** will run from 31 December 2013 to 31 December 2014 in almost every corner of Scotland. Homecoming 2014 will extend the benefits of The Ryder Cup and the Commonwealth Games and is expected to bring at least £44 million in additional expenditure to Scotland.

A £3 million fund is supporting events across Scotland - with a £1.75 million marketing campaign to get visitors to Scotland from home and abroad.

The Glasgow 2014 Commonwealth Games (23 July - 3 August 2014) will give Scotland and Glasgow a chance to shine on a world stage like never before. VisitScotland announced details of a £2.5 million campaign to target millions through a series of marketing and PR initiatives in the United Kingdom and abroad; a destination media centre and a business centre for Glasgow and events across the globe aligned to the Queens Baton Relay designed to build excitement and exposure for both Scotland and Glasgow.

As part of VisitScotland's continued promotion of golf in the build-up to **The 2014 Ryder Cup** (23 -28 September 2014) at Gleneagles in Perthshire, a global golf promotion is in place promoting the accessibility and affordability of golf across the country using the excitement of The Ryder Cup as a hook.

The campaign uses a mixture of sales promotion and online media channels in all key golfing markets. On top of this, VisitScotland launched brand new television adverts, the first ever to be purely dedicated to golf, shown during coverage of the Scottish Open on NBC in the US and Sky Sports in the UK and reaching audiences of tens of millions. It has the potential to generate £100 million in direct economic impact during The Ryder Cup with up to £40 million in international media coverage for Scotland.

Although 2014 is the best opportunity for tourism in decades, the tourism industry and all its partners needs to use the year as a launch pad for 2015 and beyond. The eyes of the world will be on Scotland like never before and the opportunity must be seized to ensure more investment, more support and, most of all, more visitors for the future.

2015 and Beyond

In 2015 Scotland will host three World Championships (Gymnastics, IPC Swimming, Orienteering) and two European Championships (Eventing, Judo) as well as the Turner Prize.

EventScotland has played an integral role in securing these events for Scotland, which will ensure there is a lasting events legacy from 2014. Alongside these major events, Scotland's programme of golf tournaments will continue with The Open Championship confirmed for St Andrews in 2015 and Royal Troon in 2016, while the 2015 Women's British Open will take place at Turnberry. The events already secured highlight the strong reputation Scotland holds with those in the international sporting community, while the presenting of the Turner Prize underlines Scotland's credentials as the perfect stage for major cultural events.

Work is also well underway to secure events from 2015 up until 2019/20, which will continue to build Scotland's international reputation as an events destination, and deliver significant economic impacts for the country through event tourism.

Business Tourism: Scotland Means Business

Scotland's business tourism industry is worth more than £1.9 billion* to the country's economy, according to a report by Meeting Professionals International Foundation.

Aligned to Scotland's priority industries, business tourism attracts conferences, business meetings and incentive groups to the country with influential delegates numbering in the tens of thousands. These gatherings enhance Scotland's credentials as a place to invest, study, live, work and visit.

Business tourism makes a strong contribution to the economic vitality of Scotland's key tourism destinations, with a particular focus on the cities of Edinburgh, Glasgow, Dundee and Aberdeen; and principal resort destinations such as Gleneagles, St Andrews and Perthshire.

In recognition of the importance of this market and its contribution to economic growth, VisitScotland launched a new £2 million Conference Bid Fund in March 2012.

VisitScotland has a Business Tourism Unit dedicated to the business events market:-

- A team of 14 based in Leith, Perth, St. Andrews, Inverness, Ayr & London
- Dedicated MICE marketing managers for North America, Europe and Emerging Markets and Associations
- Specialist sales & PR agencies for Europe and North America
- The Unit works in partnership with the city convention bureaux of Edinburgh, Glasgow, Dundee & Aberdeen
- It also works in partnership with industry and other government agencies such as Scottish Enterprise, Highlands & Islands Enterprise, Scottish Development International, Historic Scotland, SCDI, Universities Scotland, COSLA, Scottish Government, GlobalScot, EventScotland and so on.

The Business Tourism Unit is tasked with the following:-

- building a strong destination brand – "front of mind"
- educating and raising awareness of Scotland as a business events destination
- warming up emerging markets
- offering impartial assistance and advice to buyers
- enquiry distribution to industry partners

- providing marketing platforms to enable Scottish businesses to reach buyers
- generating demand for Scotland through a targeted marketing communications programme
- operating the National Bid Fund
- forming partnerships with influencers overseas.

Scotland's Years of Focus

Scotland's first year of Homecoming in 2009 was a great success, delivering a string of benefits to the country and bolstering Scottish tourism during a period of economic downturn. Recognising the success of Homecoming 2009 in rallying Scotland around a common theme, a series of strategic focuses running through to 2014 will ensure co-ordinated national activity spotlighting Scotland's greatest assets: food and drink, its reputation as an active destination, a place of culture and creativity and a place of natural beauty.

First Minister Alex Salmond announced a new programme of Focus Years to celebrate the very best of Scotland and its people. This enhances the successful programme, launched as a legacy after the Year of Homecoming 2009, which spanned food and drink, active, creative, natural and ancestral themes. Focus Years aim to support and drive Scotland's tourism and events industries to both domestic and international markets. The new Focus Years programme includes:

- 2015 – Year of Scotland's Food and Drink
- 2016 – Year of Innovation, Architecture and Design
- 2017 – Year of History, Heritage and Archaeology
- 2018 – Year of Young People

The coming focus years will look to harness this already successful relationship by looking to promote exciting areas of growth within the industry. History will be made with the opening of one of the world's most exciting new cultural attractions, the V&A in Dundee, and a brand new crossing to complement the world famous bridges across the Forth.

*based on research undertaken by the International Centre for Research in Events, Tourism and Hospitality (ICRETH) at Leeds Metropolitan University.

For further information on Scotland, visit: **www.conventionscotland.com and www.eventscotland.or**g

WALES: Visit Wales

Visit Wales is a department within the Welsh Government with official responsibility for the promotion and development of tourism in Wales.

Tourism makes a major contribution to the Welsh economy and the prospects for further sustainable growth are good. Partnership for Growth: The Welsh Government Strategy for Tourism 2013 – 2020 provides the basis for the Welsh Government, the tourism industry and other organisations to focus on the priorities that will deliver a more prosperous and competitive tourism sector.

The Wales Tourism Satellite Account (TSA) estimates total tourism spending in 2011 of £4.5bn, representing a Tourism Gross Value Added (GVA) of £1.8bn – around 4.4 per cent of total direct GVA for the Welsh economy. Emerging research suggests that when indirect impacts are added, the Tourism GVA increases to £2.5bn, which represents 6 per cent of the whole economy.

In 2011, the TSA estimated that 8.3 per cent (88,300) of all full time equivalent jobs in Wales were directly supported by tourism spending. With indirect (supply chain) added, this total FTE employment rises to over 100,000, which is equivalent to around 9.5 per cent of all Welsh FTE jobs.

The **goal** is for: *Tourism to grow in a sustainable way and to make an increasing contribution to the economic, social and environmental well-being of Wales.*

The **ambition** is to: *Grow tourism earnings in Wales by 10 per cent or more by 2020.*

The strategy has been based on detailed research and analysis of the many factors that are likely to affect the future performance of tourism in Wales. It seeks to drive higher tourism earnings to deliver maximum value for the Welsh economy and to support the delivery of the following priorities for tourism defined in the Welsh Government's Programme for Government:

- Develop tourism activity and specialist markets and secure maximum benefit from major events in our high profile venues
- Promote Wales as a destination by making a high quality tourism offer
- Work to extend the tourism season and associated benefits.
- Identify funding opportunities to improve the visitor infrastructure and product in Wales.
- Support investment in staff training and management to support a high quality tourism industry.

The strategy highlights the following two areas within the focus on Product Development:

1. Major events and festivals

Events and festivals are very important to tourism in Wales, as essential ingredients of the visitor experience providing a showcase for Welsh heritage and culture. They facilitate community involvement and offer an experience that is distinctively Welsh. Opportunities exist to selectively support new events that can enhance the reputation of Wales, but it is also important to put weight behind existing events which have the potential to grow and are helping to change perceptions of Wales.

By establishing and publicising a calendar of such events sufficiently in advance, there are opportunities for the industry to respond positively to associated opportunities and enhance the visitor experience.

At a local level too, there should be opportunities to harness the skills and talents available in communities to create attractive programmes of events that can augment the visitor experience significantly.

2. Business Tourism

The meetings, conferences and events market is relatively high spending and non-seasonal, offering potential to target business customers with leisure opportunities, but Wales is currently underperforming in attracting sufficient volume and value. The development of an international conference and events facility in the Capital Region would stimulate demand from this market which can help to reinforce a stronger city destination brand for Wales as well as encouraging Wales-wide business-to-business activity.

The Visit Wales Framework Action Plan for Years 1-3 (2013 – 2016) of the strategy includes the key actions needed to deliver the strategy including that for business tourism, with the aim to grow the meetings, conferences, events and exhibitions market through investing in new facilities and new marketing approaches. Activity will include:

1. Implement digital marketing to the existing Visit Wales business tourism database, help event organisers, and support tactical opportunities offered by regional convention bureaux e.g. familiarisation trips.

2. Evaluate market opportunities in the light of expected product developments, Economy, Science and Transport sector strategy and Major Events strategy and prepare the plan for Year 2 activity.

The marketing programme is delivered by the Product Marketing Team which integrates all business-to-business work targeting the business tourism, leisure tourism and golf sectors, along with working with key partners such as VisitBritain. The Product Marketing team promotes Wales as the destination of choice for business events including conferences and meetings, and corporate events such as incentives, team building, golf and hospitality. Primarily through www.businessevents.visitwales.com it provides product ideas, itineraries, trade contacts, images and other useful resources and can effect introductions with regional convention bureaux and suppliers in Wales. The team also works to maximise partnership opportunities working in particular with VisitBritain, UKInbound, ICCA and other significant parties.

Attracting existing major events to Wales – and encouraging new ones

Wales continues to demonstrate its strengths, both in attracting major global sporting and cultural events, and in providing a supportive and nurturing environment for home-grown events, many of which give a unique insight into fascinating aspects of Welsh life and its rich and diverse culture. Event Wales is Wales' Major Events Strategy and sets out how the Welsh Government works to ensure a co-ordinated and coherent approach to supporting major events, working with partners in both the private and public sectors, with event owners and with the full range of world class venues sited in Wales.

Following on from the outstanding success of the 2009 Ashes Test and the 2010 Ryder Cup, Wales made a full and enthusiastic contribution to the overall success of the London 2012 Olympic and Paralympic Games, working with LOCOG to help stage 11 of the Olympic football matches at the Millennium Stadium in Cardiff and providing high quality venues for 850 Olympic and Paralympic athletes and staff attending pre-Games training camps.

Moving forward, in 2013 Wales hosts the sole British legs of both the World Rally Championship and the Red Bull World Cliff Diving Series, showcasing some of Wales' most breath-taking scenery and attracting competitors and spectators from all over the world. Cardiff is also home to the Opening Ceremony for the 2013 Rugby League World Cup and WOMEX, the world's foremost professional event for folk, roots, ethnic and traditional music.

In 2014 Cardiff will, once again, stage the final of the Heineken Cup – the world's most competitive club rugby tournament that is said to find its most natural spiritual home in Wales' capital city. The event will see the 74,500-seat Millennium Stadium host the occasion for the fifth time, attracting both new and existing rugby fans alike.

Meanwhile, the city of Swansea beat impressive international competition to win the right to host the IPC European Athletics Championship in Summer 2014 – an event that will bring some of Europe's leading Paralympic athletes to one of the best athletics venues once more.

Looking ahead, Wales is already working with partners to help deliver a significant number of fixtures during Rugby Union's World Cup in 2015. In 2012 it was announced that Cardiff will host a stopover in the 13th edition of the Volvo Ocean Race in 2017-18 – a move that will see the world's premier round-the-world sailing race visit Wales for the first time ever and mark its return to the United Kingdom for the first time in over a decade.

Major events continue to enhance Wales' international reputation and help to promote the wellbeing of its people and communities. They provide significant economic benefits and a high profile platform for showcasing Wales' world class venues and world-beating Team Wales partnerships in action.

Two events for 2014 – The Senior Open Championship and Dylan Thomas 100

The Senior Open Championship

In 2010 Wales played host nation to golf's greatest team event when the Ryder Cup came to Celtic Manor Resort in Newport. Up to 35,000 spectators a day attended to watch what turned out to be four days of thrilling competitive golf, at the end of which Europe was able to win back the coveted Samuel Ryder trophy from their American rivals. Tied into the decade-long project to prepare Wales for successfully hosting the event – and for deriving maximum benefit from doing so - was a raft of complementary programmes, across tourism, sports development and business engagement, to help boost Wales' profile as a high quality and value-for-money destination in which to play, watch and learn about golf.

Soon after the conclusion of Wales' Ryder Cup year, the Welsh Government, in association with the Royal and Ancient Golf Club and the European Tour, were able to announce that Wales would now go on to host its first "major" when the Senior Open Championship descends, in July 2014, on Royal Porthcawl Golf Club. One of golf's most prestigious international competitions, the Senior Open Championship was first staged in 1987 and became part of the European Seniors Tour schedule in 1992. In 2003 it was designated as the fifth major championship on the Champions Tour schedule and, it was agreed, Wales would hold two more before 2024. Largely because of the high profile of some of the older golfing greats including 2010's European Ryder Cup captain, Colin Montgomerie, and the high standard of golf still being played by the sports over-50s, the Senior Open Championship continues to attract a loyal following, both in terms of attendance and viewer figures. Being able to host such high profile international golf events keeps Wales well in the spotlight in terms of attracting golfing visitors and deriving economic benefit from the game.

Dylan Thomas 100

On 27 October 1914, in a modest house in Swansea, south Wales, Dylan Marlais Thomas was born and Wales gained, arguably, one of its greatest writers and poets. The anniversary had, for some years, been marked by the city of Swansea but, as the centenary approached, the Welsh Government, along with partners in the Arts Council for Wales and other affected local authorities, agreed to celebrate the occasion with a renewed level of coordination and focus. Event owners with plans to mark the anniversary would be invited to apply for funding in order to allow them to honour Dylan in their own way, attract the patronage of established Dylan devotees and enthuse new audiences. Thus, Dylan Thomas 100 was born - a year-long festival of events to be held all over Wales which was able to secure HRH The Prince of Wales as Royal Patron and has been able to obtain the support of the current cream of Welsh cultural life. The programme will help showcase, to potential visitors, some of the breath-taking Welsh locations that helped inspire Dylan's work and draw attention to some of the less well-known corners of Swansea, Carmarthenshire and Ceredigion that provided him with ideas for some of his best known characters.

For further information on business events in Wales, visit: **www.businessevents.visitwales.com**

Chapter 6

Green is GREAT

Quality, Standards and Sustainability

The events and meetings industry has truly embraced the concept of continuous improvement and made a clear commitment to raising quality standards. It is now accepted that opportunities to monitor and measure quality standards exist across all elements of events and meetings delivery, from initial contact to service, facilities, equipment, food and overall experience.

However, it could also be argued that the proliferation of standards, certification and accreditation procedures may cause confusion. This chapter seeks to provide details of the principal schemes and certification processes for quality and sustainability standards.

Accreditation is both a status and a process. As a status, accreditation provides public notification that a venue, product or individual meets the standards of quality set forth by an accrediting agency. As a process, accreditation reflects the fact that, in achieving recognition by the accrediting agency, the venue, product or individual is committed to meeting standards and to seeking ways to enhance the quality of product, service or venue provided. Although gaining accreditation does not guarantee business, it reflects the quality by which the product conducts its business and it speaks to a sense of public trust as well as professional quality.

In an article entitled 'Accreditation: Meeting the Industry Standard', published by Conference & Meetings World magazine (Issue 70, online version posted 02/04/2013), Edgar Hirt, President of the International Association of Congress Centres (AIPC), suggests that the meetings industry needs to recognise those areas where accreditation will directly contribute to more efficient and effective delivery and an optimal delegate experience and ensure these are properly addressed. He says:

'There is an issue around integration because, while there are a number of qualifications aimed at specific parts of the equation (organisation, sustainability, etc.), these must all work together in an integrated form if they are to avoid conflicting with each other.'

Edgar Hirt added that he would like to see some kind of framework to manage all the diverse standards and expectations.

Initiatives have been presented that assist venues in their ambitions to comply with best practice, improve customer satisfaction and make a solid value proposition. Among the most successful of these is the Meetings Industry Association's (MIA) accreditation, AIM *(Accredited in Meetings)*.

AIM

AIM, *Accredited in Meetings*, is a very important quality standard providing event organisers with the reassurance of venue excellence.

Extensive Development Process

The story of AIM is not one of overnight success: the recent surge in interest in the accreditation, which began in late 2012, is the result of over half a decade's planning and development. Jane Longhurst, Meetings Industry Association (MIA) chief executive, who spearheaded the accreditation from its earliest stages, explains how AIM's development was a detailed process: *'It had been clear for a long time that meetings venues needed an accreditation that was specific to their needs. The various hotel-related schemes were not entirely suitable, and were the only alternative, so we set out to create an accreditation the entire industry could embrace, one that ticked all the procurement boxes. Developing an all-encompassing kite mark, one that both venues and industry buyers could trust and really see the value of took time. We spent well over a year developing AIM, working with the Best Practice Forum and calling on experts from all sectors of the industry, such as venue managers and venue finding agents, for advice and input. Finally, when we had all the pieces in place for a robust accreditation scheme, we launched.'*

AIM was trialled by the North West Regional Development Agency before its national launch in Spring 2007. The launch was met with mixed feelings because, in what could be considered a bold move, the MIA had made AIM accreditation a requirement of membership of the association. All MIA members had to achieve AIM within a year!

'Some people predicted AIM would bring about the end of the MIA. They said it was too much too soon, but we kept faith, we knew we had completed extensive research and taken greats pains in ensuring AIM was exactly the accreditation the industry was demanding, so we felt confident the majority of our members would quickly see the advantages; thankfully it paid off', Jane Longhurst continued.

In reality, AIM has had a positive effect on MIA membership, contributing to steady growth year on year.

One of the MIA's objectives as a trade association is to raise facilities and service standards throughout the meetings, conference and events industry. In order to realise this objective the MIA has made AIM available to all organisations involved in the industry - it no longer matters whether these organisations are members of the MIA or not or what their affiliation is - every venue and supplier to the industry can obtain AIM if their standards meet the requirement of the scheme.

There are now over 500 meetings venues, destinations and suppliers with AIM.

The Virtues of AIM

To meetings and event buyers, AIM means they can quickly find venues they can instantly trust. Choosing an AIM venue is a way of protecting their budget and is a big step toward ensuring their event is a success. So what does AIM really mean?

- It means doing business with venues that care
- It means events and meetings where delegates are well looked after
- It means knowing every element of the venue's costs in advance
- It means industry-approved contracts and terms and conditions
- It means doing business with credible, legally compliant venues
- It means procurement boxes ticked
- It means stress free venue selection
- It means total peace of mind.

Meetings Code

All AIM venues have integrity and abide by the Meetings CODE which demands:

- Consistency
- Openness
- Decency
- Ethics

AIM venues achieve 50 grading criteria that include: the location and accessibility of the meeting rooms and facilities; the suitability of the lighting and heating in meeting rooms; the levels of security; how often the rooms are cleaned and decorated; whether the space and furniture are adequate and suitable; the provision of in-room services such as power sockets; what is supplied at no extra charge and how transparent the published prices are.

It doesn't end there: AIM-accredited venues and suppliers must comply with ten legal Acts:

- Health & Safety at Work and Fire Safety
- Disability Discrimination
- Employers Liability
- Data Protection
- Sale & Supply of Goods
- Trade Descriptions
- Consumer Protection
- Weights & Measures
- Race Relations, Sex Discrimination, Disability Discrimination and Age Discrimination.
- Licensing Laws.

AIM Higher

Along with the standard Entry level of AIM, there are two 'AIM Higher' levels: AIM Silver and AIM Gold. These demonstrate compliance with a more stringent set of criteria. Venues that have been awarded AIM Higher have completed a ten-section self-assessment, produced a portfolio of evidence in support of their application and have been visited by an independent assessor who determines whether the venue is worthy of the accreditation and, if so, whether AIM Silver or AIM Gold should be awarded.

The Greatest Challenge

The greatest challenge for AIM has proved to be gaining the support of the entire conference, meetings and events industry. The route to achieving this began by gaining endorsement from other independent organisations concerned with promoting meetings, events and venues in the UK and Ireland. VisitEngland found in AIM a demonstrable advantage for English venues – AIM's expansion is now a key element of VisitEngland's Business Tourism Action Plan. Visit Wales and Tourism Ireland top the list of tourism organisations that have endorsed AIM, along with 29 national and regional destinations. AIM also has the support of influential UK business tourism-related trade associations MPI UK and ABPCO.

With widespread independent support, the industry has taken note and AIM is now firmly established as its only national standard for meetings venues and suppliers to the industry.

Growing Momentum

In 2013, the AIM message has momentum. Venue search portals are including AIM as a search filter and several of the country's leading venue finding agents are requesting that venues they recommend have AIM accreditation. AIM is achieving its objectives, driving the industry to become more competitive and accountable, deliver great value and help clients consistently achieve ROI. Ultimately, the promise of AIM is the promise of an industry able to survive the many challenges of the present and the future, a meetings and events landscape in the UK fronted by a vast mosaic of trustworthy venues of all varieties.

In September 2013 the Hotel Booking Agents Association (HBAA) endorsed AIM, recognising that the accreditation supports its core objective of assisting the industry in raising standards and delivering best practice through service and facilities. It also acknowledged that achieving AIM will be a benefit to its members, as it promotes professionalism and gives them a distinct competitive advantage. The endorsement is expected to significantly increase the choice buyers have of venues which offer AIM's reassurance of compliance, capability and competence.

Purple Guide

One of the key reference tools for the events industry is the much-used '*Purple Guide*' ('The Event Safety Guide – A Guide to Health, Safety & Welfare at Music and Similar Events'). This is a comprehensive guide to health, safety, risk assessment and management for events.

A new version of the 'Purple Guide' is due to be published by the Events Industry Forum (EIF) in March 2014. 'The Purple Guide to Health, Safety and Welfare at Music and Other Events' has been developed in consultation with the events industry and enforcement authorities, including the Health & Safety Executive who published the original version in the 1990s.

Initially 24 chapters will be published, with others to follow later in 2014. The new guide will be maintained as an online publication and the EIF is retaining the original Working Groups to keep it up-to-date. The intention is that each chapter will be reviewed at least annually.

It is intended that this new version of the Guide will become the established reference for event organisers as well as enforcers, in the same way that the original did. Indeed, the original version helped to establish the credentials of the UK events industry around the world and is still used in many countries as the definitive guide to event management.

The new guide can be found at **www.thepurpleguide.co.uk**

The UK's major purpose-built event venues have developed a similar document to the Purple Guide which serves both as a safety guidance and as a common rule book for those venues participating. Facilitated by the Association of Event Venues (AEV), the 'eGuide' is currently deployed by 15 UK venues including Earls Court, ExCeL, the NEC and FIVE (Farnborough).

Written and updated every six months by a technical committee comprising the venues' senior operational and safety personnel, the eGuide contains detailed rules for event organiser tenants and for contractors working in the venue. Sections cover everything from event electrics and temporary structure construction to the way food safety is managed at an event or beauty treatments are undertaken at public events.

The eGuide is generally intended for use at public exhibitions and business trade shows and contains a lot of detail about the construction of exhibition stands.

Established in 2009, the initiative consolidated two objectives: to raise standards of safety in this part of the event industry and also to achieve a common approach from venue to venue in order to make organising and participating in a UK event as straightforward and consistent as possible without sacrificing those standards of conduct.

The eGuide can be accessed at: **www.aev.org.uk/eGuide**. Further information on the eGuide is included in the 'exhibitions and trade fairs' section in Chapter 3 of this Report.

Environmental and sustainability issues

Few news broadcasts today are completed without some reference to environmental issues such as global warming, carbon emissions, and the very sustainability of our planet. These same issues have also become mainstream concerns and challenges within the events industry.

Facetime Magazine (Winter 2013) quotes Fiona Pelham, Managing Director of Sustainable Events, which aims to help businesses implement sustainability standards: ***'Initially, a brand manager or marketer might not think that they need to be concerned about sustainability when they're planning an event, product launch or even an AGM. But any event brings a business's brand to life. So sustainability is a reputational issue, really – marketing managers need to realise that most brands are aligning with sustainability in some way.'***

November 2013 saw the launch of plans to form a global vision for a sustainable events industry, based on ongoing worldwide collaboration between venues, agencies, associations and suppliers across business, sport and cultural events. A working party, to include representation from BVEP and several BVEP member organisations, will seek to ensure that the campaign is inspiring, collaborative, simple and influential – it will draw on historical campaigns such as *Make Poverty History* for inspiration and it will have an online presence.

At this international level, there have already been a number of significant developments designed to integrate sustainability criteria and activities into a wide range of business events, including the publication of formal Standards to provide guidance on sustainable event management. For example:

British Standard 8901: Sustainability Management System for Events

BS8901 was launched as a draft standard in November 2007. After a consultation process with the events industry, a revised draft standard was released in 2009 with the title:

'BS8901: 2009 Sustainability Management System for Events – Specification with Guidance for Use'

The purpose of BS8901 is to help the events industry to conduct business operations in a more sustainable manner. The standard is applicable to the full range of events and needs to be applied to the full life-cycle of an event (ie. from conception to final review) as well as extended throughout the supply chain. It is based on the Plan-Do-Check-Act process that is already used in event project management and requires measuring and monitoring of performance and the identification of Key Performance Indicators (KPIs) within a context of continuous improvement.

The standard is also described as 'proportional' – in other words, an organisation's or individual's role and position in the supply chain, its size, capacity to adopt the system and ability to implement it will determine which requirements of the standard apply.

BS8901 applies to event clients, event organisers/management, venues, and related supply chains. Like ISO9001 (Quality Management System), ISO18001 (Health and Management System) and ISO27001 (Information Security Management System), BS8901 is a standard enabling certification to be provided. Certification is for the management system used by an organisation to manage its event-orientated activities, products and services and can be for one event only. The event, therefore, is considered to be the 'output' of the system.

Copenhagen Sustainable Meetings Protocol

The Copenhagen Sustainable Meetings Protocol (CSMP) offers a flexible, umbrella framework that can be used to organise large, complex meetings in a more sustainable way. The protocol is not a standard that provides accreditation or certification – rather it is intended to help planners manage their meetings sustainably. The CSMP aims to complement other existing guides present in the market, and it is not only targeted at corporate, government and association event organisers, but also consultants and managers in venues and large hotels. It is designed to be used in combination with the 'COP15 Event Sustainability Report'.

The CSM is divided into chapters on: sustainable event management; introduction to the Protocol framework; leadership and commitment; strategic approach to stakeholder engagement; operational integration; governance; and sustainability and the future of the meetings industry.

Development of ISO20121: International Standard for Sustainable Event Management

This new international standard for sustainable event management was developed by over 30 countries and was launched in June 2012. The aim is to provide an international standard following the worldwide adoption of the British Standard for Sustainable Event Management (BS8901).

ISO 20121 is an event sustainability management system standard which addresses the implementation of sustainability within the events industry. It is not a list of actions which each event must take, because every event is different – instead it is a framework to ensure that sustainability is considered at every point. The framework is likely to include:

- Identifying issues: users of the standard will identify where their behaviour negatively impacts socially, economically or environmentally
- Stakeholder engagement: users of the standard will share their issues with stakeholders to ensure all issues are identified
- Objective setting: users will set objectives and targets for how to address their specific issues

The standard can be used by individuals or companies who plan events and also by the events supply chain, including venues.

APEX and ASTM Green Meetings and Events Standards

The very first green meetings and events standards were launched by the Convention Industry Council's Accepted Practices Exchange (APEX) and The American Society for Testing and Materials International (ASTM) in February 2012. The APEX/ASTM standards are broken down into nine individual sector standards, covering all facets of event planning and management:

- Audio-Visual
- Communication & Marketing Materials
- Destinations
- Exhibits/Exhibitions
- Food & Beverage
- Meeting Venue
- On-Site Office
- Transportation
- Accommodation(s)

The standards are available for purchase individually (the costs range between US$40 and US$46) or as a full package for US$149. For more details visit: **www.astm.org/BOOKSTORE/COMPS/GREENMTGS.htm**

Event Organizers Sector Supplement (EOSS)

This document, developed over a 2-year period by a team of volunteers drawn from event agencies, government, labour and civil society organisations and published in January 2012 by the Global Reporting Initiative, is intended to help event organisers report their sustainability performance and provide quantitative and qualitative information on sustainability issues. In addition to more widely applicable issues such as greenhouse gas emissions and waste, the guidance assists event organisers to report on more specific issues including attendee travel, the legacy of the event, and initiatives taken at the event to promote sustainability and transparency.

The Supplement has three sections covering profile, management approach and performance indicators:

- **Profile**: how to disclose the event's or organisation's strategy, profile and governance structures
- **Management approach:** how an event organiser addresses a given set of sustainability topics in order to provide context for understanding performance in a specific area
- **Performance indicators:** specific indicators that elicit comparable information on the economic, environmental and social performance of the organisation and/or event.

The Supplement offers different levels of reporting (from Level C up to Level A) and provides structure, indicators and advice.

To download the guidelines (which are free of charge), visit: **https://www.globalreporting.org/reporting/sector-guidance/event-organizers/Pages/default.aspx**

Other useful web addresses:

http://www.greenkeyglobal.com/

CASE STUDY

Fairmont Hotels and Resorts

Fairmont Hotels and Resorts has introduced a new Sustainable Design Policy for all of its worldwide properties. In addition to LEED (Leadership in Energy and Environmental Design) guidelines, a number of other green rating systems and programmes will influence Fairmont's activity in this area including the BREEAM (standards for best practice in sustainable building design, construction and operation) programme in Europe, Estidama Pearls in Abu Dhabi, and China's Three Star programme.

'Instituting formalised design and construction guidelines for our robust pipeline of new hotel projects and ongoing capital agenda adds a new dimension to our environmental mandate,' says Fairmont President, Chris Cahill. *'Environmental stewardship is part of Fairmont's DNA and we want to ensure it's evident in all phases of our business.'*

Fairmont's Sustainable Design Policy also includes new environmental criteria and checklists for renovation projects and property retrofits, environmental consultation during the design brief and construction process, and the creation of a green build best practice repository for use by its hotels, engineers, developers, project leads and architects.

CASE STUDY

Singapore's MICE Sustainability Guidelines

The Singapore Tourist Board (STB) has launched (November 2013) Sustainability Guidelines to serve as a reference point for Meetings, Incentive Travel, Conferences and Exhibitions (MICE) industry players in Singapore. These guidelines are referenced from international standards such as ISO 20121 and the APEX/ASTM Environmentally Sustainable Meeting Standards and geared towards those who are keen to adopt sustainable practices. STB also hopes that the guidelines will encourage local MICE players to meet global sustainability requirements.

The Sustainability Guidelines cover seven industry categories from across the business events ecosystem including hotels, venues, event organisers and meeting planners, transportation, food and beverage, as well as audio-visual set-up. Areas covered under the guidelines include waste management and the efficient use of water and energy as well as initiatives that encourage employees to develop a commitment to sustainable practices.

The Sustainability Guidelines for the MICE industry will complement the various green practices, policies and programmes for hotels and other buildings in Singapore. The Singapore Hotel Association organises a biennial Singapore Green Hotel Award to recognise local hotels for their efforts in water management, energy conservation, waste minimisation, waste recycling and other green initiatives. The Building and Construction Authority's Green Mark scheme encourages more environmentally-friendly buildings and raises environmental awareness among developers, designers and builders.

'To transition to a sustainable meetings and events industry, convention bureaus have a key role to unite their members and partners in collaborative action and innovation on a destination scale. Their role as a leader is key to help organisations understand the business value of sustainable practice, educate stakeholders, share knowledge, recognise best practices, champion the use of standards and to lobby for greater action,' said Guy Bigwood, past President of the Green Meetings Industry Council and MCI Group Sustainability Director. *'STB's sustainability strategy and newly-developed Sustainability Guidelines will inspire their community and bring Singapore to the forefront of sustainability on a global scale.'*

Further information: **www.stb.gov.sg/**

Chapter 7

Education is GREAT

Education, Careers and Professional Development

Introduction

This chapter examines the current position of education, recruitment, development and careers in events and allied sectors. As highlighted earlier in this report, there are many organisations and sectors that work in or are associated with events, and there is now a growing commitment to bring these together under a common professional structure. Whilst many people working in organisations that plan or are involved with events come from a variety of backgrounds and work experiences, there is an increasing number that have had a prior education in events. Some may see the growing number of graduates from the various universities running events-related courses as a threat; others see such new entrants as a welcome opportunity to review their businesses through innovative approaches and engaging ways.

This chapter aims to summarise the educational, careers and professional situation and some of the future issues that all stakeholders need to engage with to maintain the event sectors in the UK as GREAT. We are all in this together, whether educators, policy-makers or event organisers. The Olympics and Paralympics reaffirmed our position on the world's stage and we need to keep our place on that gold step with our colleagues from around the globe. By working collaboratively rather than competitively, we can achieve this.

Education – Curriculum and qualifications

The 2010 'Labour Market Review of the Events Industry' undertaken by People 1st (the Sector Skills Council covering the events sector) identified that there is an *'array of qualifications available to employers'*. The emphasis was on supporting work-based training. Since the last report there has been less of an emphasis on specific qualifications such as the Foundation Degree and the 14-19 Diplomas. Neither of these has been successful, with the Foundation Degree Forward (fdf) closing in 2011 and little take-up of Diplomas. This has meant that the pressure has been on university degrees, undergraduate, postgraduate and short courses to be both industry-focused and academically relevant.

There are now a range of undergraduate and postgraduate courses available full-time, part-time or online from a number of universities and further education colleges within the UK and internationally. Information on undergraduate courses may be found on **http://search.ucas.com**

The Association for Events Management Education (AEME), founded in 2004, has continued to work with the various industry bodies, and sits on the umbrella Business Visits and Events Partnership (BVEP). Instrumental in writing the revised QAA (Quality Assurance Agency) Higher Education HLST Subject Benchmark Statements in 2008 that saw the inclusion of Events, AEME has always championed the need for industry internships and applied research (for further information about AEME, please visit **www.aeme.org**).

More can be done to encourage all organisations in events to work with their local education and training providers, and less in isolation. There are several main areas where industry and educational organisations can work together, working with students on projects and events: work placement opportunities; guest speakers; research projects; and graduate recruitment. The 'Making Waves International Conference on Events' and the 10th AEME Forum in Bournemouth (July 2013) was a good example of industry representatives engaging with academic research from around the world. Following the conference, at the end of 2013, industry trade associations met to discuss better collaboration and initially identified two education-related activities that the industry could provide collaboratively: cross-industry internships and training programmes specifically with and for students; and better communication for both academics and students on the offerings of industry trade and professional associations through the creation of an online hub.

Skills

The industry has focused predominantly on the skills required for working at the different levels of event positions. This may well be because of the success of the Sector Skills Councils. What has been less successful has been achieving the recognition that successful events are also about the attitude, flexibility, good communication skills, passion and personality of those working in this people industry. It is gradually being recognised that what makes events mean so much to individuals, businesses, the economy and society, is their potentially unique nature. The skills of creativity and innovation are related to those of design and communication.

Being able to see and think about aspects of events in a different way is what graduates with event degrees can offer the event industry. It is not just about how to plan and execute an event in a safe and profitable manner, but to do so in a meaningful way with efficient use of scarce resources.

Learning on the job does not necessarily enable people to think differently (i.e. 'out of the box'). Education and continuing professional development (CPD) are essential to be ahead of the next new idea or technology - to be able to see the opportunities and benefits for events. Events could be leading the way in new design and not relying on film and theatre to do this for them. The opening and closing ceremonies of the Olympics and Paralympics 2012 demonstrated how the creative industries are as much a part of the events industry as of their own. Nurturing, developing and releasing these initiatives is what will keep British events GREAT.

In its Labour Market Review (2010), People 1st identified a number of areas where there were skills gaps. These included:

- understanding the client's industry/needs
- managing suppliers
- customer service
- crowd management
- an understanding of legislation/standards such as health and safety and sustainability.

The 2013 review of the National Occupational Standards (NOS) increases the number and, therefore, detail of individual units but does not necessarily change the three core levels through which people develop as part of their career in events. The attributes of these are described as skills by People 1st.

- For Account Directors they include:
  - People management and leadership
  - Strategy and budget management
  - Solid understanding of suppliers
- For Account Managers they include:
  - People management
  - Project management
  - Ability to liaise and build relationships with clients
  - Supplier management
- For Event Executives they include:
  - Excellent verbal and written communication
  - Excellent organisation and administrative skills
  - Customer service
  - Degree in event management desirable.

These are outlined and drawn with other related industries in the People 1st career map that is now hosted by the Hospitality Guild (**http://hospitalityguild.co.uk/A-Career-in-Hospitality/Career-Map#/industry/events**).

Recruitment

Only parts of the events sector occupations are covered by the standard industrial classification (SIC) codes (e.g. 82.30 = convention and trade show organisers; 68.20/2 = letting and operating of conference and exhibition centres) used by Governments to quantify the numbers of people working in particular industry sectors. However, various estimates have been made in recent years:

- People 1st's 'Labour Market Review of the Events Industry' (January 2010) quotes the total estimate for the events industry as 530,000 employees
- MPI's report, 'The Economic Impact of the UK Meeting and Event Industry' (July 2013), estimates that the total number of full-time equivalent jobs directly created by meetings activities was 423,445 in 2011 (see Chapter 1)
- UK Music's 'Wish You Were Here' research (see Chapter 3) revealed that music tourism directly and indirectly sustained 24,000 full-time jobs in the UK.

A number of recruitment agencies produce their own surveys each year that give us an idea of the types, levels and salaries of those working in events. The identification of event positions in related fields such as marketing demonstrates how the professional nature of the roles has been recognised. For example:

ESP (**www.esprecruitment.co.uk**) in association with Event Magazine (**www.eventjobsearch.co.uk**) and Zing Insights undertake a regular salary survey (see Table 7.1). The full 2013 Event Salary Survey can be accessed via the ESP website

Eligo (**www.eligo.co.uk**) - categorises job vacancies under different headings: Conferences, Exhibitions, Venues, Agencies, Institutions/Associations and Charities

PFJ Media Recruitment (**www.pfj.co.uk**) has job vacancies in events/conferences/exhibitions and has done a survey of salaries and benefits across conference and events sales and marketing positions

Hudson (**www.uk.hudson.com**) identifies Events Director, Manager and Executive as part of its Marketing salary survey

TPP (**www.tpp.co.uk**) undertakes a salary survey for those working in fundraising, including events, from Assistant/Coordinator to Director level.

Table 7.1

The Event Industry Salary Survey 2013

Sector	Job title	Minimum salary 2013 £	Maximum salary 2013 £	Average salary 2013 £
1. Agency Events Management				
	Business Devt. Manager	25,000	45,000	35,250
	Business Devt. Director	45,000	75,000	56,000
	Event/Account Coordinator	14,000	29,000	22,000
	Event/Account Executive	18,000	32,000	25,000
	Event/Account Manager	20,000	48,000	31,000
	Account Director	26,000	85,000	50,000
2. Charity/Public Events				
	Marketing Executive	22,000	30,000	25,250
	Marketing Manager	26,250	40,000	33,000
	Event/Conference Coordinator	18,400	35,000	25,750
	Event Executive	23,000	32,700	26,200
	Event/Conference Manager	24,000	45,000	33,750
	Head of Events/Conferences	39,500	85,000	50,250

3. Commercial Conferences				
	Marketing Executive	20,000	28,500	26,250
	Marketing Manager	25,000	40,000	33,000
	Marketing Director	40,000	70,000	50,000
	Event/Conference Administrator	18,250	24,000	19,000
	Conference Coordinator	18,000	26,000	24,000
	Event Executive	22,000	36,500	26,500
	Conference Manager	26,000	62,000	32,500
	Conference Director	42,000	72,100	52,500
	Producer	24,000	38,000	28,000
	Senior Producer	32,000	45,000	35,000
	Sponsorship Manager	24,000	55,000	32,000
	Sponsorship Director	42,250	72,000	55,000
4. Conference & Incentive Travel				
	Business Devt. Manager	21,800	39,250	32,000
	Account Executive	15,000	25,000	22,000
	Account Manager	20,000	35,000	28,000
	Account Director	40,000	95,000	51,000
5. Corporate In-house				
	Event Administrator	20,000	35,800	23,000
	Event Coordinator	19,624	41,000	27,250
	Event Executive	23,000	45,000	32,000
	Event Manager	30,000	75,000	39,250
	Head of Events / Conferences / Roadshows	50,000	90,000	72,000
6. Event Services				
	Business Devt. Executive	21,150	26,000	22,000
	Business Devt. Manager	22,000	48,000	32,000
	Business Devt. Director	32,000	77,000	49,200
	Event Coordinator	15,000	21,000	18,200
	Event Executive	18,000	35,000	25,000
	Project Manager	18,000	51,000	32,000
	Event Director	40,000	70,000	47,350
7. Exhibitions				
	Sales Executive	18,275	28,350	22,500
	Sales Coordinator	17,200	27,500	19,300
	Sales Manager	24,000	48,000	32,250
	Exhibition Director	40,000	85,000	56,000
	Marketing Executive	15,500	30,000	25,500

	Marketing Manager	23,000	43,000	34,350
	Marketing Director	40,000	80,000	60,000
	Operations Executive	20,000	36,000	24,000
	Operations Manager	26,000	53,500	34,000
	Operations Director	37,000	96,000	55,000
8. Experiential				
	Marketing Director	34,000	75,000	54,100
	Account Manager	25,000	70,000	38,500
	Account Director	38,500	75,000	57,350
8. Hotels				
	Sales Coordinator	15,000	24,000	21,000
	Sales Executive	17,000	28,000	23,250
	Sales Manager	17,000	45,000	30,000
	Director of Sales	40,000	85,000	64,500
	C&B Coordinator	16,500	22,000	19,000
	C&B Manager	21,000	32,000	26,000
	Director of Events	35,000	55,000	43,500
9. Not-for-Profit				
	Marketing Executive	20,000	32,650	25,200
	Marketing Manager	20,500	40,000	30,250
	Event Coordinator	18,500	34,000	25,100
	Event Executive	21,000	38,000	27,000
	Event Manager	26,000	45,000	34,000
	Head of Events / Conferences	35,000	70,000	55,000
10. Production Company				
	Business Devt. Manager	21,000	56,000	34,000
	Production Coordinator	19,500	28,000	22,500
	Operations/Event Executive	19,250	28,000	25,000
	Production Manager	26,000	45,000	36,000
	Logistics Manager	28,000	55,000	34,000
	Technical Manager	31,000	60,000	45,000
	Head of Production	41,000	90,000	63,500
11. Sport / Music / PR				
	Event Manager	20,000	40,000	32,100
	Event Director	35,000	75,000	50,000
	Event Coordinator	18,000	30,000	22,200
12. Venues				
	Sales Coordinator	16,000	27,040	21,400
	Sales Executive	18,000	30,000	23,250

Sales Manager	23,000	53,000	35,750
Sales & Marketing Director	42,500	150,000	58,000
Marketing Executive	21,000	27,000	23,000
Marketing Manager	22,000	80,250	36,000
Event Coordinator	16,000	26,000	21,250
Event Manager	19,800	58,000	30,000
Operations Director	45,000	108,000	61,500

Source: ESP Recruitment, 'Event' Magazine and Zing Insights (reproduced with permission)

Professional Development: Institute of Event Management, CPD

The establishment of Industry Sector Skills agencies for the UK was an attempt to create and promote professional standards through developing codes of practice and the sharing of such best practice. Below under Information you will find links to those that may have relevant information to those working in events. The main Sector Skills Council for events is People 1st, which aims to bring together all of those industries where people are at the heart of the experience that organisations are offering and planning. The last Labour Market Review of the Events Industry (People 1st 2010) highlighted the need for '*a programme of continued professional development to create a true profession for those working within it*' (Eade, 2010, page 1).

The driver for professionalisation within events has been, most notably, London's hosting of the Olympic and Paralympic Games in 2012. The other instigator has been BVEP itself which, as an umbrella organisation, has understood that the events sector has perhaps not got the recognition that it deserves and BVEP thus supported the establishment of an Institute of Event Management (IEM) to act as a force for bringing the disparate CPD courses and Higher Education programmes together. Goldblatt (2002, p.8) recognised that events had grown and matured to have three main characteristics that warranted professionalisation:

- The profession must have a unique body of knowledge
- The profession typically has voluntary standards that often result in certification
- The profession has an accepted code of conduct or ethics, and states that the profession of event management meets each of these qualifications.

However, this is not an easy task, not just for a stand-alone organisation such as the IEM but also because of the size of the undertaking involved in professionalising to be on a par with traditional professions such as the legal and financial sectors. As Getz (2007) discusses, events are more a 'quasi-profession' because there is no regulatory or licensing status that requires it. Research by Thomas and Thomas (2013) identifies that there is still much work to do to gain industry support and to have the regulatory role that makes practising in events a licensed requirement.

The Institute of Event Management is being established to provide an opportunity for individuals who already work or wish to work in the Events Sector to gain professional recognition and to enhance their profile, skills and knowledge. The aim is for the Institute to offer a route to professional development, accreditation of courses and a body of knowledge. The Institute will seek to champion professional recognition and raise awareness of the role of event professionals. It will support employers in providing real-time information and resources, and developing appropriate continuing professional development (CPD) programmes to meet their needs. The Institute will also offer a forum for the provision of fresh ideas and information together with opportunities for debate and discussion. The Institute has been constituted as a 'not-for-profit' company limited by guarantee. It worked throughout 2013 with People 1st to review the National Occupational Standards (NOS) in order to develop a number of NOS that can subsequently be pulled together into a framework of qualifications to which all trainers and providers can work.

National Occupational Standards (NOS) are not qualifications of themselves – they describe what an individual needs to do, know and understand in order to carry out a particular job or function. The key purpose of an event manager was revised to:

'create and deliver opportunities for people to participate in an event to meet audience and stakeholder needs to achieve economic, professional, environmental or social objectives'.

The Key Roles under which each of the NOS sit have been identified as:

A. Manage commercial aspects of an event
B. Manage the marketing and sales of an event
C. Manage the design and creativity of an event
D. Manage the operations of an event
E. Evaluate an event
F. Manage information
G. Manage resources.

The events management body of knowledge (EMBOK) is being defined and developed. The purpose of EMBOK is to create a framework of the knowledge and processes used in event management that may be customised to meet the needs of various cultures, governments, education programmes, and organisations. For further information on EMBOK visit: **www.embok.org** A practical example of the type of knowledge 'domains' covered by EMBOK is given below in the description of the Events Management International Competency Standards (EMICS).

Competency Standards in Events Management

Alongside the creation of EMBOK is the development of competency standards for events management. In the United Kingdom, for example, competency standards were developed for the National Vocational Qualifications, while similar standards have also been developed in Australia, Canada and South Africa. Bowdin et al (2011) suggest that:

A competency standard for events management gives the industry a benchmark to measure excellence in management. Previously this benchmark was the success of the event; however, stakeholders cannot wait until the event is over to find out whether the event management was competent – by then it is too late.

Events Management International Competency Standards (EMICS) have been developed by the Canadian Tourism Human Resource Council (CTHRC) in cooperation with industry participants from 20 countries. The Standards contain a comprehensive summary of the functions, tasks and competencies required to work in event management. They describe in detail the skills, knowledge and attitudes that employers and clients are looking for when obtaining professional services to plan, implement and evaluate different types of events, nationally and internationally.

The International Standards cover a number of 'domains', including:

- Strategic Planning
- Project Management
- Risk Management
- Financial Management
- Human Resources
- Stakeholder Management
- Meeting or Event Design
- Site Management
- Marketing
- Professionalism

Full details of the standards can be downloaded at **www.emerit.ca** under the 'Free Downloads – Occupational Standards' link.

Meeting Professionals International (MPI) has developed a comprehensive set of competency standards, known as the Meetings & Business Events Competency Standards (MBECS), launched in 2011. A product of several international boards, governmental bodies, task forces and MPI itself, MBECS are designed to provide a detailed catalogue of the skills needed to be a meetings professional.

The Standards cover twelve areas:

1. Strategic Planning
   a. Manage Strategic Plan for Meeting or Event
   b. Develop Sustainability Plan for Meeting or Event
   c. Measure Value of Meeting or Business Event
2. Project Management
   a. Plan Meeting or Event Project
   b. Manage Meeting or Event Project
3. Risk Management
4. Financial Management
   a. Develop Financial Resources
   b. Manage Budget
   c. Manage Monetary Transactions
5. Administration

6. Human Resources
   a. Manage Human Resources Plan
   b. Acquire Staff and Volunteers

The 12 major categories cover 33 individual skills which are, in turn, informed by sub-skills. The full Standards can be downloaded from the MPI website (**www.mpiweb.org/mbecs**).

Issues

a) Competition and confusion of qualifications

There are many event trade and professional associations, as demonstrated just by the membership of the BVEP itself. Despite the creation of the Institute of Event Management, there is still some way to go before this is fully operational and has a flow of new memberships and accreditations.

Some existing organisations already claim to be the professional organisation for their part of the events sector e.g. the Association of British Professional Conference Organisers (ABPCO), Meeting Professionals International (MPI), the International Festivals & Events Association (IFEA), and the Professional Convention Management Association (PCMA). The Institute of Hospitality has launched a revised accreditation guide that includes intentions to accredit Events, Hospitality, Leisure and Tourism courses, including the degree programmes with which the IEM is planning to work (**https://www.instituteofhospitality.org/accreditation/Accred/Accreditation_Guide_Oct2013**). The Institute of Hospitality Accreditation Framework (p.29) is a good example of the different levels and frameworks that exist, including (see also **http://ofqual.gov.uk/help-and-advice/comparing-qualifications/**):

- QCF (Qualifications and Credit Framework)
- NQF (National Qualifications Framework)
- FHEQ (Framework for Higher Education Qualifications), noting the differences with Scotland
- there is also the EQF (European Qualifications Framework) that works alongside the Bologna Framework for Higher Education in Europe.

See **http://ofqual.gov.uk/qualifications-and-assessments/qualification-frameworks/qualifications-in-europe/** for links to additional information for transferability of qualifications and benchmarking of skills, competences and occupations.

b) Internationalisation

Organisations and, therefore, employees are working and studying internationally. Even the event recruitment specialist, ESP, has a focus on the Middle East (**www.espinternational.ae**). The cultural challenges of international events is an interesting area that could be better understood through research and collaboration.

c) Contracts and Conditions

The short-term nature of events means that many organisations are what is known as 'pulsating organisations', using a number of agencies and sub-contractors to provide the skills and expertise required to host and organise an event such as the 2012 Olympic and Paralympic Games. This can be seen as the way that events work, but the criticism of the zero hour working contracts experienced in some areas of events has come under general scrutiny, as has unpaid internships for students and graduates. This is something that the industry should take seriously and tackle if it is not to undermine its own strength.

Another aspect of the demands and barriers of working in events is illustrated by the focus on Women in Events as seen in recent trade magazine articles. Although men comprise a disproportionately small percentage of the workforce, much of the power and ownership still remain male-dominated. The current composition of students and graduates at UK universities indicates that the gender balance may well not change in the foreseeable future. There need to be schemes that encourage more males to enter the industry alongside actions to remove the barriers limiting career progression for women.

The nature of events means that many employ volunteers - why and how they do so needs careful management. The huge success of the volunteer Games Makers demonstrated the great legacy of the 2012 Olympic and Paralympic Games in working with volunteers but this does require a particular way of recruiting, training and rewarding the volunteers. The growth in events student numbers has increased the numbers passionate about volunteering but these opportunities should not be abused; nor should they be seen as a replacement for paid internships or graduate schemes that are meeting different needs for the employers and the students.

d) Technology

The advances in technology can be really exciting for the industry but also quite daunting. Too often organisations feel that they should be using every latest platform, without confirming the strategic fit to themselves and to their customers and clients. As a result, education and CPD should be focusing not just on the skills and knowledge of employees but also on future-proofing and preparing their whole organisation for digitisation and mobile, haptic and holographic technologies.

All aspects of events are being potentially transformed by technology - this can make events more powerful but also challenge fundamentally some businesses or sectors in the value chain. The way in which education and jobs are acquired is being challenged by technology. The opportunity afforded people with free access to global information through the World Wide Web, such as TEDx or MOOCs (mass open online courses), has demonstrated how people can access some of the world leaders in their subject. Existing event associations use webinars and other platforms to distribute or gain wider geographical connectivity. However, as demonstrated by FaceTime (**www.facetime.org.uk**) or organisations such as Cisco, the virtual does not yet replace the power of the actual personal contact. Those times might come though unless we do research and understand the nature of both, and continue to exploit fully the potential provided by opportunities such as hybrid events.

Information

Related Sector Skills Councils (SSCs)

People 1st **www.people1st.co.u**k. SSC for hospitality, passenger transport, travel and tourism. They cover 14 industries, including events.

Creative Skillset **www.skillset.org**. SSC for entertainment media, fashion and textiles, publishing and advertising, marketing and communications.

Creative & Cultural Skills **www.ccskills.org.uk** . SSC for creative and cultural industries, including craft, cultural heritage, design, literature, music, performing arts and visual arts.

SkillsActive **www.skillsactive.com**. SSC for Active Leisure, Learning and Well-being.

e-skills **www.e-skills.com**. SSC for Business and Information Technology.

ConstructionSkills CITB **www.citb.co.uk**. SSC for the construction industry.

Careers

Sources of information on jobs and careers

- **www.prospects.ac.uk/cms/ShowPage/Home_page/Explore_types_of_jobs/Types_of_Job/p!eipaL?grpno=E3&state=showgrp** (event organiser & conference centre manager job descriptions)
- **www.esprecruitment.co.uk**
- **www.event-jobs.net**
- **www.eventjobsearch.com/careers**
- **www.simplymarketingjobs.co.uk/jobs/event_marketing_jobs/event_marketing_jobs/d/**
- **www.totaljobs.com**
- **www.fashionmonitor.com/jobs**
- **www.vox-pop.co.uk**

Jobsite (2013) *Today's Young People, Tomorrow's Workforce* – a report available at: **http://www.jobsite.co.uk/insider/young-people-expectation-mismatch-opportunities-potential-11973/**

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Chapter 8

Innovation is GREAT

The 'Britain for Events' Campaign

Short History of ‘Britain for Events’

The ‘Britain for Events’ campaign evolved from a number of former incarnations – in its early stages it began as ‘National Meetings Week’, before ‘Keep Britain Talking’ and finally its current body, ‘Britain for Events’. From a week-long campaign, it grew to a six month and annual dedicated campaign to assist the promotion of the UK events industry.

Campaign Objectives

‘Britain for Events’ is the UK event industry’s most inclusive self-promotional campaign. The initiative is tasked with representing the full spectrum of the events industry including: conferences, exhibitions and business events; festivals, live, outdoor, sporting and cultural events; and incentive travel, training and corporate travel events.

It is an externally facing initiative targeted towards businesses, consumers and government to encourage the growth and development of the UK events industry.

In 2013-14 the campaign’s objectives remain to build on the inroads made in the previous year and continue to make the UK a competitive international industry; to be the official ‘flag waver’ for the industry and to underline its value to business, government and the wider event-going public.

To increase the international competitiveness of the UK events industry, ‘Britain for Events’ aims...

- To be a voice of the UK events industry
- To promote the value and volume of the UK events industry
- To promote the value of face-to-face communication
- To negotiate more favourable operating environments for businesses within the meetings and events industry.

Results Achieved

In the last year over £1m worth of positive PR was achieved across the industry, into business, national and consumer media, and including print, broadcast and online exposure.

‘Britain for Events’ contributes to four annual national business event supplements – in this past year it has supported and featured in The Times and Guardian business supplements:

The Times, Raconteur Business Events, 19 September 2012

RACONTEUR

Business Events

Valuing the events industry for economic growth

Where is best for your event – home or away?

The Guardian, Business Events Supplement, 15 February 2013

Actions and Activity during 2013-2014

2012-2013 was once again a landmark year for the campaign, which continues to grow its status as the most inclusive self-promotional campaign for the UK events industry. Influence in front of media was grown through four separate national supplements, in front of government through endorsements and support as secretariat for the All Party Parliamentary Group Inquiry on Events – alongside key campaign supporter International Confex - and in front of business through growing relationships with UKTI. All of this to encourage event organisers around the world to buy British.

Looking ahead, the campaign has received even greater backing, once again from Prime Minister David Cameron, but also from Hugh Robertson, Minister for Sport, Tourism and the Olympic Legacy, and Lord Sebastian Coe, former Chair of the London Organising Committee for the Olympic Games.

'Britain for Events' has acted as secretariat for the first ever All Party Parliamentary Group (APPG) inquiry into the competitiveness of the UK events industry, the findings of which were announced in December 2013 (see Chapter 1). The campaign has been instrumental in providing background information and reference for the inquiry, briefing MPs, and providing administration support and assistance to the inquiry Chair, Nick de Bois MP. The inquiry's key findings and recommendations were presented to the events industry at a briefing in December 2013. This forms a major part of the annual 'launch' event and a chance to shine a light on the events industry. Direct responsibilities and an 'Action Plan' from the inquiry will form much of the activity for 'Britain for Events' for both 2013 and 2014. Looking forward it will be the role of 'Britain for Events' to apply pressure for the implementation of the inquiry recommendations.

Equally, through a relationship with IMEX, the 'Declaration of Support' initiative is being taken forward and into the UK market to encourage senior government ministers to sign up and support the industry. The 'Declaration of Support' highlights the characteristics of the sector as a major driver of growth and development in the world economy where it creates jobs, increases trade, attracts inward investment, spreads knowledge, enhances innovation and regeneration, nurtures community cohesion and enriches the visitor economy whilst shaping destinations. This will also allow the campaign to support the Civic Leaders event initiative currently being discussed in the BVEP.

Turning away from the governmental agenda, 'Britain for Events' has recently formed productive partnerships with UK Sport, UK Music and the Festival Organisers Association to give further representation to this side of the events industry. These relationships will be instrumental in representing the 'live' sector of the events industry and joining closer relationships between live and business events.

These relationships bring the entire events landscape under one 'roof' and there is now also the collateral to present a united voice. Following successful discussions with 'No.10' and VisitBritain, there is now a new and revitalised 'Events are GREAT' creative that is free for the industry to use through its own promotional marketing, internationally and domestically. The 'Britain for Events' relationships with UKTI will spur the distribution of this creative with **www.britainforevents.co.uk** acting as the landing page for those wishing to know more about the industry.

'Britain for Events' joined forces with the International Special Events Society (ISES) to host the E20 (May 2013), which saw 20 major destinations and venues discuss the growing role of creativity in the export of UK events and will be taking the action points forward to promote the UK's creativity in business.

One of the aspects the industry asked the campaign to look at is its role in supporting the next generation of event organisers. In 2013 'Britain for Events' therefore launched B4E Generations, part of the campaign's commitment to educate students in understanding the wider industry into which they are entering. Already this has led to representatives from the campaign speaking at Hertford and Queen Margaret Universities and future engagements with Bournemouth and Westminster Universities.

In December 2013 'Britain for Events' announced that it had created two new member groups as part of a programme to develop the campaign. The two support groups, the Advisory Council and Steering Group, are designed to strengthen the effectiveness of the campaign, the most inclusive of the UK events industry. The Advisory Council will consider the campaign's objectives and determine priorities for the annual programme. The Steering Group has been tasked with guiding the campaign's programme and ensuring its effective implementation.

Why and how to get involved with Britain for Events

By supporting the campaign supporters will have:

- Free access and use of the Britain for Events brand
- A seat at the table at every event be it business, media and governmental to represent the industry
- Branding on all of the Britain for Events campaign collateral
- Knowledge that they will be contributing to the long term prosperity of the UK events industry

Britain for Events has three main levels of support...

Supporter: £500

Designed exclusively for event industry associations to support the campaign through their alignment, their senior level counsel and by promotion through their membership base

Partner: £1,250

Offered to hotels, venues, regional destinations and corporate organisations to gain a 'seat at the table' and input into the direction, delivery and wider distribution of the campaign and its messages

Sponsor: £5,000

Reserved for larger corporations, destinations and brands looking to take a leading role in the direction and delivery of the campaign.

Further Information

For further information, visit: **www.britainforevents.co.uk**

Chapter 9

Research is GREAT

Sources of Research and Market Intelligence on the Business Visits and Events Sector

There is a wide variety of data and research on the business visits and events sector. Some of this is produced on a regular (usually annual) basis; some is in the form of ad hoc reports and papers published to address a topical issue; some is only available as a membership benefit from one of the industry's trade or professional associations (although press releases are usually issued highlighting key points from such information). This chapter provides a summary of key information sources.

The BVEP Research Group will discuss potential gaps in existing research provision and seek to identify how such gaps might best be filled.

a) Research undertaken on a regular basis

'Advito' forecasts and white papers covering global trends in the corporate travel sector (and includes a paper on global meetings management consolidation). Advito is an independent operating unit of BCD Travel, the world's third largest travel management company, with headquarters in Texas. Further details: **www.advito.com**

'AMEX 2013 Meetings Forecast' – published by American Express Meetings & Events, taking a look at global trends in the corporate meetings sector and including regional analyses for key regions of the world. The report is available free of charge from: **https://businesstravel.americanexpress.com/meetings-and-events/**

'British Hospitality: Trends & Developments' – British Hospitality Association, published annually (October). Overview of, and data on, tourism, leisure, hotels and hospitality, including a section on employment and qualifications in the sector. Further details: **www.bha.org.uk**

'British Meetings and Events Industry Survey 2014' – CAT Publications (November 2013) – demand-side data based on interviews with 600 event organisers (300 corporate, 300 association and public sector), covering buying patterns, experiences and expectations; includes editorial articles from leading industry figures. Further details: **www.meetpie.com/bmeis**

'Convention 2020' 'Convention 2020' is a global strategic foresight study that is looking at the exhibitions, meetings and events sector from the 'outside in', designed to help leaders across the meetings industry prepare for the decade ahead to ensure they stay viable and competitive. The study is sponsored by the International Congress and Convention Association (ICCA), IMEX (the trade exhibition), FastFuture and by an array of other industry organisations. Further details: **www.convention-2020.com**

'EIBTM Industry Trends and Market Share Report' – EIBTM/Reed Travel Exhibitions. An evaluation of global trends impacting meetings and incentives, compiled by Rob Davidson and published at the EIBTM exhibition each year (November/December). The report can be downloaded free of charge from: **www.eibtm.com**

'Exhibitions and Conferences: Market Report' – Key Note Ltd. A biennial overview of the UK exhibitions and conference market, with assessments of market size, trends, competition, economic forecasts, and including some exhibition company profiles – latest edition 2013 (priced £575). Further details: **www.keynote.co.uk**

'Exhibitions & Conferences Market Report 2013' – Research and Markets Ltd. Looking at the UK and European markets. The report is priced at Ð695 for an electronic copy and at Ð871 for a hard copy. Further details: **www.researchandmarkets.com**

'European Cities Marketing Benchmarking Report' – European Cities Marketing – an annual report focusing on the strategic and competitive positions of European city destinations in membership of ECM. Further details: **www.europeancitiesmarketing.com**

'Grass Roots Meetings Industry Reports' – Grass Roots – previously produced as a major annual 200-page report, in 2013 this was changed to several shorter research papers highlighting the global outlook and trends for the corporate meetings sector. Further details from: **www.grassroots.uk.com/**

'International Association Meetings Market 2012' – International Congress and Convention Association (ICCA) (May 2013). Rankings of all meeting/convention cities and countries globally, with analysis of trends. Further details: **www.iccaworld.com**

'International Passenger Survey' (IPS) data on inbound trips by business visitors into the UK, providing volume and value estimates for visitors to conferences, exhibitions, and other business trips, further broken down by region of the country. Further details: **www.visitbritain.org/insightsandstatistics/**

'International Meeting Statistics for the Year 2012' – Union of International Associations (June 2013). Rankings of all meeting/convention cities and countries globally, with analysis of trends. Further details: **www.uia.org**

'State of the Nation 2013 Hospitality and Tourism' – published annually by People 1st, this is the fourth in a series to examine skills and labour market trends across the UK's hospitality and tourism sectors. Available for free download by visiting: **www.people1st.co.uk/research**

'The MIA Pathfinder Research' – Meetings Industry Association – a quarterly snapshot of trends experienced by meetings industry buyers and suppliers. Further details: **www.mia-uk.org**

'Trends and Spends Survey' – an annual survey undertaken by CAT Publications (June) on booking volumes of outbound conference and incentive trips from major UK event agencies. A second part of this is 'The Annual Financial Benchmarks Survey of UK Event Organisers' undertaken by Brett Howell Associates for CAT Publications (November), which compares the year-on-year financial performance of the leading UK event agencies. Further details: **www.meetpie.com**

'UK Events Market Trends Survey 2013' – Eventia (July 2013) – supply-side data on the size, characteristics and trends of the UK conference, meetings and business events market – based on a survey of over 200 event venues across the UK. Further details: **www.eventia.org.uk**

b) Reports and publications produced on a one-off basis

'2014 Travel Price Forecast – M&E Supplement' – produced by CWT Meetings & Events (September 2013), looking at global trends for meetings buyers and suppliers. Further details: **www.carlsonwagonlit.com**

'A Modern History of International Association Meetings 1963-2012' – published by the International Conference & Convention Association (ICCA)(2013). Further details: **www.iccaworld.com**

'Beyond Tourism Benefits' – produced by Business Events Sydney (October 2011) and examines the ways to measure the social legacies of business events. Further details: **www.businesseventssydney.com.au**

'Business Value of Meetings' – a 3-year study published by MPI (June 2011) focusing on meetings output/meetings effectiveness, proving the value of meetings and business events' output. Further details: **www.mpiweb.org**

'Future of Meetings' – a series of reports compiled by Leeds Metropolitan University on behalf of the MPI Foundation. The reports are available free of charge to MPI members and for purchase by non-members. Further details: **www.mpiweb.org**

INCON articles – a series of papers published by the this consortium of PCO companies specialising in the international association conference market. Further details: **www.incon-pco.com**

IAPCO Articles – ad hoc articles written by members of the International Association of Professional Congress Organizers (IAPCO) to comment on current and emerging trends; in 2013 these covered: 'So what is the right venue for your event?', 'Sustainability: Lessons Learnt from the Great Earthquake of 2011', 'Attention, Please! Content is King'. Further details: **www.iapco.org** IAPCO also publishes a range of best practice papers available for free download from its website.

'Inside the Mind of a Corporate' – Hotel Booking Agents Association (September 2009). A paper reviewing key issues from a buyer perspective, including: driving greater value, consolidating spend, communications and compliance, sustainability, traveller security. Further details: **www.hbaa.org.uk**

'Labour Market Review of the Events Industry' – People 1st (January 2010). A survey examining employment, training, skills, qualifications, and continuing professional development needs for the events sector. Downloadable free of charge from the Business Visits & Events Partnership web site (Research section):**www.people1st.co.uk/research/reports**

'Lessons Learned from 2012: Mega Events and the UK Events Industry Supply Chain' – research undertaken by Crewsaders on behalf of the International Special Events Society (ISES) (February 2013). To download a free copy visit: **www.businessvisitsandeventspartnership.com**

'Measuring up' – 2013 survey of the UK conference sector undertaken by PricewaterhouseCoopers on behalf of the Hotel Booking Agents Association (HBAA) and Conference Centres of Excellence. Further details: **www.hbaa.org.uk / www.cceonline.co.uk**

'Meetings and Conventions 2030: a study of megatrends shaping our industry' – study undertaken by the Institute for Futures Studies on behalf of the German Convention Bureau (October 2013). It identifies and describes five megatrends covering technology, globalization, mobility, sustainable development and demographic change. Further details: **www.germany-meetings.com/future**

'Meetings and Events: Where Savings Meet Success' – Carlson Wagonlit Travel (July 2010) – an overview of the global meetings and events market, including estimates for its total value, and an 8-steps guide to optimising company expenditure on meetings and event management. Available to download free of charge from: **www.carlsonwagonlit.com**

'Meetings Plastic: Drastic or fantastic?' – HBAA white paper (December 2011) which examines the growing presence and implications of credit card payments in strategic meetings management. Available to download free of charge via link from: **www.hbaa.org.uk**

'Money for Nothing: Payment models in the meetings market' – Hotel Booking Agents Association (February 2009). A paper reviewing the different payment models relating to meetings, from commission to transaction fee to management fee. Further details: **www.hbaa.org.uk**

'Strategic Meetings Management' – final report published 2013 by Meeting Professionals International (MPI) based on research undertaken by Leeds Metropolitan University. The report is available free to MPI members and for purchase by non-members. Further details: **www.mpiweb.org**

'The Economic Impact of the UK Exhibitions Industry' - Oxford Economics study on behalf of FaceTime and Vivid Interface, published February 2012. The report can be downloaded free of charge at: **www.facetime.org.uk/** (Research section)

'The Economic Impact of the UK Meeting and Event Industry' – two studies published in 2013 on behalf of the Meeting Professionals International Foundation by Leeds Metropolitan University. The studies can be downloaded free of charge from: **www.mpiweb.org/ukeis**

'The Future of Meetings' – a series of studies published in 2012 by Meeting Professionals International based on research undertaken by Leeds Metropolitan University. Further details at: **www.mpiweb.org/FOM**

'The Future of Strategic Meetings Management' – Global Business Travel Association (GBTA) report examining the state of strategic meetings management programs across North America (October 2013). Available free of charge to GBTA members and for purchase by non-members by emailing: **pyachnes@gbtafoundation.org**

'The Global Business Travel Spending Outlook 2011-2015' – Global Business Travel Association study (August 2011) analysing the current state of global business travel spend and growth projections over the next five years. Further details: **www.gbta.org**

'The Value of CSR in the Meeting Industry' – research undertaken by Leeds Metropolitan University on behalf of Meeting Professionals International (MPI)(2012). Further details: **www.mpiweb.org**

'Top Ten Meeting Trends for 2013' – Benchmark Hospitality International, based on insights and feedback from its managed hotels, resorts and conference centres in North America – free to download. Further information: **www.hospitalitynet.org/news/4059993.html**

'Why Face-to-Face Business Meetings Matter' – a white paper published by the International Association of Conference Centres (IACC), and available for free download. Further information: **www.iacconline.org**

'Wish You Were Here: Music Tourism's Contribution to the UK Economy' – research commissioned by UK Music and VisitBritain and undertaken by Oxford Economics, published October 2013. Available for free download from: **www.ukmusic.org/researcy/tourism-research**

The Joint Meetings Industry Council's website (**www.themeetingsindustry.org**) has a very useful list of the publications and reports produced by its international association members. See the website section on 'Industry Resources'.

Chapter 10

Partnership is GREAT

Business Visits & Events Partnership

The Business Visits & Events Partnership (BVEP) is an umbrella organisation representing leading trade and professional organisations, government agencies and other significant influencers in the business visits and events sector.

The BVEP exists to:

- garner the cohesive opinion of these stakeholders and to collectively influence and develop policies, practices and strategies that support and generate growth in the sector and,
- raise sector awareness through clear communications of the social and economic benefits of the business visits and events sector.

The Partnership seeks to provide a cohesive point of view for the entire business visits and events sector. The BVEP works with prominent sector leaders including its partners, government departments and agencies to influence and develop policies and practices favourable to the growth of business events, and trade and creative enterprise through business visits and events.

It has the support of the leading trade and professional organisations and government agencies with a shared interest in the economic benefit and growth of conferences, meetings, exhibitions, trade fairs, incentive travel, corporate hospitality, ceremonies, as well as other business, sporting, cultural and festival events.

Access to full BVEP information is via the web site: **www.businessvisitsandeventspartnership.com**

The partners

Partners of the Business Visits & Events Partnership (as at Winter 2013) comprise:

Association for Conferences and Events (ACE)

Kemp House, 152 City Road, London, EC1V 2NX
T: +44 (0)330-2230280;
E: ace@aceinternational.org;
www.aceinternational.org

ACE acts as an information centre and forum for member organisations involved in organising, marketing, accommodating and servicing events. It also organises training courses on aspects of event planning and management.

Association of British Professional Conference Organisers (ABPCO)

Barn Down, Pool Row, Main Street, Willersey, Gloucestershire, WR12 7PJ
T: +44 (0)1386 858886;
E: info@abpco.org
www.abpco.org

The aim of ABPCO is to raise standards of professionalism across the meetings industry and to increase business for its members. Membership requires a high level of professional competence and experience, and members are also offered opportunities for training and personal development.

Association for Events Management Education (AEME)

c/o UK Centre for Events Management, Leeds Metropolitan University, Cavendish Hall Room 103, Headingley Campus, Leeds LS6 3QU

T: +44 (0)113 812 3484;
F: +44 (0)113 812 3111;
E: G.A.J.Bowdin@leedsmet.ac.uk;
www.aeme.org

AEME exists in order to support and raise the profile of the events discipline through the sharing of education and best practice. It is also the first international organisation to draw together events management educators and will act as a channel through which industry, professional bodies and the media can liaise with events education providers. Membership is open to individuals and organisations.

Conference Centres of Excellence

Evesham House, Ashorne Hill, Leamington Spa, Warwickshire CV33 9QW

T: +44 (0)1926 448063;
F: +44 (0)1926 419280;
E: AnthonyLishman@cceonline.co.uk;
www.cceonline.co.uk

Conference Centres of Excellence is the UK's only marketing consortium of top quality, dedicated conference and training centres. Its skills and resources are focused on conferences and learning.

Eventia- IVCA

5th Floor Galbraith House, 141 Great Charles Street, Birmingham B3 3LG

T: +44 (0)121 212 1400;
F: +44 (0)121 212 3131;
E: sarah@eventia-ivca.org;
www.eventia-ivca.org

Eventia-IVCA is the largest UK-based trade association for communication professionals involved in the design and delivery of events, live marketing, digital and corporate film production. It provides leadership and representation on important issues to Government, regulators and the corporate community. It also promotes the highest standards of professionalism and best practice.

Events Industry Alliance (EIA)

113 High Street, Berkhamsted, Herts, HP4 2DJ

T: +44 (0)1442 873331;
F: +44 (0)144 875551;
E: info@eventsindustryalliance.com
www.eventsindustryalliance.com

The EIA is a business created by three event industry bodies – ESSA, AEO and AEV – to provide an association management secretariat service in the events industry. The Association of Event Organisers (AEO) is the trade body representing companies which conceive, create, develop or manage trade and consumer events. The Association of Event Venues (AEV) is an organisation serving an established event venue community, focused on creating and driving platforms that service fundamental industry needs. The Event Suppler and Services Association (ESSA) is a trade association representing contractors and suppliers of goods and services to the events industry. The three Associations are run by their members for the benefit of the members through an elected council of representatives, specialist working groups and a full-time secretariat. The aim is to be the voice of the multi-billion pound event industry, to serve the collective needs and to promote the interests of their members and of the industry at large.

Events Industry Forum (EIF)

c/o The Event Services Association, Association House, 18c Moor Street, Chepstow, NP16 5DB

T: +44 (0)1291 636331
E: jim@tesa.org.uk;
www.eventsindustryforum.co.uk

The Events Industry Forum is an informal body providing opportunities for events industry trade associations and similar bodies to meet to discuss issues of common interest.

Hotel Booking Agents Association (HBAA)

9 Chestnut Suite, Guardian House, Borough Road, Godalming, Surrey GU7 2AE

T: +44 (0)845 603 3349;
E: executiveoffice@hbaa.org.uk;
www.hbaa.org.uk

The trade association for the hotel booking agency, apartment and venue community. Driving best practice. Helping both businesses and individuals within them strive for the highest professional standards in the procurement and booking of accommodation, conferences and events.

International Congress and Convention Association (UK & Ireland Chapter) (ICCA)

Kerrin MacPhie, Chair, c/o ACC Liverpool, Kings Dock, Liverpool L3 4FP

T: +44 (0)151 703 7260;
E: kerrin.macphie@accliverpool.com
www.iccaworld.com

ICCA is now one of the most prominent organisations in the world of international meetings. It is the only association that comprises a membership representing the main specialists in handling, transporting and accommodating international events. With 1,000 ICCA members in more than 90 countries around the world, it is the most global organisation within the meetings industry. The UK & Ireland Chapter has some 75 members and holds a range of meetings and seminars throughout the year. It supports industry research.

International Special Events Society (ISES) UK

ExCeL London, 1 Western Gateway, London E16 1XL

T: +44 (0)20 7069 427;
E: operationsmanager@isesuk.org;
www.isesuk.org and www.ises.com

The International Special Events Society is the principal association representing creative event professionals, globally.

Local Authorities Events Organisers Group (LAEOG)

Andrew Grove, Chair, c/o Basingstoke and Deane Borough Council, Civic Offices, London Road, Basingstoke, Hampshire, RG21 4AH

T: +44 (0)1256 845455;
E: chair@laeog.org;
www.laeog.org

LAEOG is an organisation of local authority employees with a remit for organising, authorising and facilitating events. It offers training, and shares information and best practice. It supports the industry in working through change, improving consistency and striving for excellence.

London & Partners

Convention Bureau and Major Events, 2 More London Riverside, London, SE1 2RR

T: +44 (0)20 7234 5800;
F: +44 (0)20 7378 6525;
E: thalliwell@londonandpartners.com;
www.londonandpartners.com

London & Partners is the Mayor of London's official promotional organisation, with a remit to attract overseas companies, events, students and visitors to the capital, creating additional jobs and economic growth for the city.

A not-for-profit public private partnership, funded by the Mayor of London and a network of commercial partners, London & Partners houses the city's official convention bureau which helps to secure business events and major sporting and cultural events, and supports the organisers to ensure these events are a success.

Meet in Ireland

Nations House, 103 Wigmore Street, London W1U 1QS.

T: +44 (0)207 518 3358.
E: jmcelroy@tourismireland.com;
www.meetinireland.co.uk

Meet in Ireland is the official MICE (meetings, incentives, conference and events) brand for the island of Ireland. It comprises three official tourism authorities: Tourism Ireland, Fáilte Ireland and the Northern Ireland Tourist Board.

Working in partnership with the tourist boards, Fáilte Ireland in the South and Northern Ireland Tourist Board in the North, Tourism Ireland is the organisation responsible for marketing the island of Ireland overseas as a holiday and business tourism destination.

Meeting Professionals International – UK & Ireland Chapter (MPI)

Manor Cottage, South Moreton, Didcot, Oxfordshire OX11 9AH

T: +44 (0)7889 644527;
E: administrator@mpiuk.org
www.mpiuk.org

MPI is one of the leading associations for the global meetings industry and is committed to delivering success for its 20,000 worldwide members by providing innovative professional development, generating industry awareness and creating business development opportunities.

Meetings Industry Association

PO Box 515, Kelmarsh, Northamptonshire NN6 9XW

T: +44 (0)845 230 5508;
F: +44 (0)845 230 7708;
E: info@mia-uk.org;
www.mia-uk.org

The MIA sets the 'Gold Standards' for the UK meetings industry. As a supplier-led, buyer-focused organisation, the MIA is committed to benefiting and enhancing the UK meetings industry through the encouragement of the highest standards in facilities and standards.

National Outdoor Events Association (NOEA)

PO Box 4495, Wells, Somerset BA5 9AS

T: +44 (0)1749 674531;
E: Secretary@noea.org.uk
www.noea.org.uk

The National Outdoor Events Association is the UK's leading outdoor events trade association. The association is dedicated to enhancing professionalism in the outdoor events industry through education, networking, lobbying, advice and creating business opportunities. The NOEA membership is comprised of event suppliers, event production professionals, event and festival organisers, entertainment agencies, local authority events departments, venues, universities and freelancers. It produces a members' yearbook and organises an annual convention and several regional conferences annually.

Northern Ireland Tourist Board (NITB)

Business Tourism Unit, St Anne's Court, 59 North Street, Belfast BT1 1NB

T: +44 (0)28 9044 1676;
F: +44 (0)28 9024 0960;
E: businesstourism@nitb.com;
www.discovernorthernireland.com/convention and **www.twitter.com/businesstourism**

NITB supports the activities of the two city convention bureaux in Belfast and Londonderry and the key tourism destinations to attract conference, association and incentive business to Northern Ireland. The Business Tourism Unit facilitates the Northern Ireland business tourism trade through participation in overseas promotions, familiarisation inspections by overseas conference organisers and incentive houses and providing a link to suppliers of conference services.

Professional Convention Management Association (PCMA)

c/o Carolyn Clark, 35 East Wacker Drive, Suite 500, Chicago, IL 60601 USA

T: +1 312.423.7262;
E: cclark@pcma.org;
www.pcma.org

The Professional Convention Management Association (PCMA) is the leading organisation for meetings, tradeshow and event professionals. PCMA's mission is to deliver superior and innovative education and promote the value of professional convention management.

VisitEngland

Sanctuary Buildings, 20 Great Smith Street, London SW1P 3BT

T: +44 (0)20 7578 1442.
E: simon.gidman@visitengland.org
www.visitengland.com/business

VisitEngland is the national tourism organisation for England with responsibility for growing the value of international business through the promotion of England's superb corporate events, incentive and large convention product.

VisitScotland

Business Tourism Unit, Ocean Point One, 94 Ocean Drive, Edinburgh EH6 6JH

T: +44 (0)131 472 2355;
F: +44 (0)131 472 2009;
E: businesstourism@visitscotland.com
www.conventionscotland.com

The Business Tourism Unit of VisitScotland actively promotes Scotland as a dynamic destination for meetings, conventions, incentive travel and corporate events. It produces guides and brochures to help the meeting or incentive planner, and gives impartial advice and assistance with venue selection.

Visit Wales

Visit Wales Product Marketing Team, QED Centre, Main Avenue, Treforest Industrial Estate, Treforest, Pontypridd, Rhonda Cynon Taf, CF37 5YR

T: +44 (0)300 061 6091;
F: +44 (0)29 2047 5321;
E: businessevents@visitwales.gsi.gov.uk;
www.businessevents.visitwales.com

Visit Wales, the tourism department of the Welsh Assembly Government, provides MICE buyers with impartial advice, assistance with venue selection, local knowledge and support services. Visit Wales also supplies statistics, consultations and business information on tourism in Wales, and provides a range of marketing platforms for Welsh suppliers.

Supporting Government departments and agencies

Department for Culture, Media & Sport

Department for Culture, Media & Sport, Tourism Division, 2-4 Cockspur Street, London SW1Y 5DH

T: +44 (0)207 211 6172;
E: mark.harrison@culture.gsi.gov.uk
www.gov.uk/dcms

DCMS fully supports the business events and tourism sectors. DCMS provides access to Government endorsements for international events as part of the Ministerial Bid Support Initiative.

UK Trade and Investment (UKTI)

UK Trade & Investment Enquiry Service, BIS Enquiry Unit, 1 Victoria Street, London SW1H 0ET

T: +44 (0)20 7215 5000;
www.ukti.gov.uk (the home page contains enquiry forms for contacting UKTI by email).

UK Trade and Investment is the Government organisation that supports both companies in the UK trading internationally and overseas enterprises seeking to locate in the UK. It offers independent, impartial advice and support to existing exporters and those new to international trade.

VisitBritain

VisitBritain, Sanctuary Buildings, 20 Great Smith Street, London SW1P 3BT

T: +44 (0)20 7578 1000;
E: david.bishop@visitbritain.org;
www.visitbritain.org

VisitBritain is Britain's national tourism agency, responsible for promoting Britain worldwide and developing its visitor economy. It works with partners in both the UK and overseas, including government agencies, such as UK Trade and Investment (UKTI), the Foreign and Commonwealth Office (FCO) and the British Council, airlines and operators, global brands such as Samsung and the Barclays Premier League, and the official tourism bodies for London, England, Scotland, Wales, as well as individual destinations. It also advises Government and industry on tourism issues, particularly those that affect the UK's international competitiveness, providing policy solutions, market intelligence and customer insights.

BVEP communications and media advisers

Davies Tanner

Longford House,
19 Mount Ephraim Road,
Tunbridge Wells, Kent TN1 1EN

T: +44 (0)1892 617904;
F: +44 (0)1892 619101;
E: Alistair.turner@daviestanner.co.uk;
www.daviestanner.com

Davies Tanner is a specialist PR and communications agency working in the travel, tourism and events industry and is communications partner to the Business Visits & Events Partnership.

BVEP

Access to full information on BVEP and its partner organisations is via the website:
www.businessvisitsandevents partnership.com

2014

EVENTS ARE GREAT

BRITAIN

HOME TO WORLD-CLASS FESTIVALS, SPORTING OCCASIONS, BUSINESS CONFERENCES AND TRADE EXHIBITIONS